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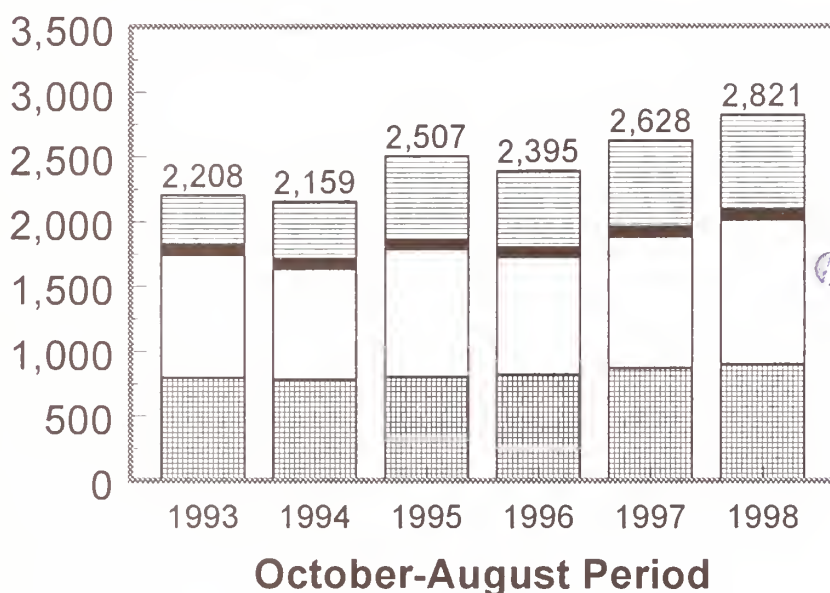
Foreign  
Agricultural  
Service

Circular Series  
FHORT 11-98  
November 1998

# World Horticultural Trade and U.S. Export Opportunities

## U.S. Horticultural Product Exports to Canada on Pace to Set a Record in FY1998

Value in \$Million



■ Fresh & Processed Fruits ■ Fresh & Processed Vegetables  
■ Tree Nuts ■ Other

Source: U.S. Bureau of the Census

U.S. horticultural product exports to Canada are running at a record pace, up more than 7 percent this fiscal year from the same time period a year ago, valued at \$2.82 billion for the 11-month period. Fresh and processed vegetables are showing the largest value gains. U.S. horticultural product exports to Canada have been increasing steadily since the implementation of the U.S.-Canada Free Trade Agreement (FTA). In fiscal year (FY) 1997, U.S. sales to Canada reached a record \$2.87 billion, 10 percent above the previous year and 35 percent higher than in FY 1991. More than one-fourth of total U.S. horticultural exports go to Canada. Fresh vegetable exports, alone, account for 25 percent of total U.S. horticultural exports. There is a large number of products where nearly 40 percent or more of U.S. exports go to Canada. These include broccoli, carrots, cauliflower, celery, lettuce, onions, peppers, potatoes, tomatoes, blueberries, grapes, kiwifruit, melons, peaches, nectarines, strawberries, orange juice, tomato paste and sauce, and trees and shrubs. The gain in horticultural exports has in part, been the result of tariffs being eliminated under the United States-Canada FTA (which later became part of NAFTA).

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Devon Camel	202-720-0897	Tree nuts, avocados, nursery products, Canada/Snapback, circular team
Bob Knapp	202-720-4620	Canned deciduous fruit, kiwifruit, special projects
Emanuel McNeil	202-720-2083	Fresh and processed vegetables (excl. Potatoes), cut flowers
Debra A. Pumphrey	202-720-8899	Coffee/cocoa supply and demand, spices, essential oils, U.S. tea trade, trade forecasts, Information technology coordinator
Stephanie Riddick	202-720-9792	Table grapes/grape juice, wine/brandy, circular team
Joe Somers	202-720-2974	Situation/Outlook coordinator, monthly circular supervision, trade forecast coordinator, FAO citrus liaison, reporting coordinator, circular editor
Mark Petry	202-720-6877	Fresh and processed citrus, sugar trade, honey, circular team
Vacant	202-720-9903	Dried fruit, berries, beer/hops, tropical fruit, melons, circular team, NAFTA quarterly report
Janise Zygmunt	202-720-1176	Organics/Analysis, biotechnology issues
<u>MARKETING</u>		
Ted Goldammer	202-720-8498	Potato analysis, hops, citrus
Pamela McKenzie	202-720-2252	Berries, kiwifruit
Steve Shnitzler	202-720-8495	Avocados, ginseng, apricots, papaya
Yvette Wedderburn Bomersheim	202-720-0911	Wine, brandy, export credits, honey, grape juice, canned fruit
Kelly Strzelecki	202-690-1341	Dried fruit, Organics
Vacant	202-720-9903	Vegetables, and melons
Ingrid Mohn	202-720-5330	Tree nuts
Sonia Jimenez	202-690-6057	Fresh deciduous fruit

## Table of Contents

PAGE

### WORLD TRADE SITUATION AND POLICY UPDATES:

Organics in Austria . . . . .	9
Timely Israeli TRQ Announcement Should Boost FY 1999 U.S. Export Prospects for Dried Fruits and Tree Nuts . . . . .	9
Taiwan Bans Imports of Citrus from Two California Counties . . . . .	10
Korea Applies Restrictive Quarantine Policy to U.S. Citrus . . . . .	10
Lettuce Marketing Opportunity in Japan Muted by Restrictive Quarantine Policy . . . . .	10

### EXPORT NEWS AND OPPORTUNITIES:

U.S. Horticultural Product Exports to Mexico Will Set a Record in Fiscal Year 1998 . . . .	11
USDA and Industry Troubleshooting Efforts Improve Outlook for U.S. Apples to Finland . .	11
USDA Announces \$3.5 Billion in FY 1999 GSM-102 Programs . . . . .	12
USDA Announces \$321 Million in Supplier Credit Guarantees for FY 1999 . . . . .	12

### FEATURE ARTICLES:

Northern Hemisphere Apple Situation . . . . .	16
Table Grape Situation and Outlook . . . . .	28
Almond Situation and Outlook . . . . .	34
Walnut Situation and Outlook . . . . .	38
Canned Deciduous Fruit Situation for Selected Countries . . . . .	41

### STATISTICS:

U.S. Horticultural Product and Market Export Summaries . . . . .	4
U.S. Horticultural August Export Summary . . . . .	5
U.S. Horticultural August Import Summary . . . . .	7
FY 1999 GSM-102 Credit Guarantee Coverage . . . . .	14
FY 1999 Supplier Credit Coverage . . . . .	15
Apples: Production, Supply, and Distribution . . . . .	22
U.S. Apple Exports . . . . .	26
Table Grapes: Production, Supply, and Distribution in Selected Countries . . . . .	31
United States: Table Grape Exports and Imports . . . . .	33
Almonds: Production, Supply, and Distribution in Selected Countries . . . . .	37
Walnuts: Production, Supply, and Distribution in Selected Countries . . . . .	40
Canned Peaches: Production, Supply, and Distribution . . . . .	43
Canned Pears: Production, Supply, and Distribution . . . . .	45
Canned Fruit Mixtures: Production, Supply, and Distribution . . . . .	47
Canned Apricots: Production, Supply, and Distribution . . . . .	49
United States: Canned Peach Imports and Exports . . . . .	50
United States: Canned Pear and Canned Fruit Mixtures Exports . . . . .	51
August U.S. Exports of Horticultural Products by Country of Destination . . . . .	52
August U.S. Imports of Horticultural Products by Country of Origin . . . . .	58

### Export Summary

U.S. exports of horticultural products to all countries in August totaled \$810 million, down 4 percent from the same month a year earlier. Nine out of 15 categories registered decreases. Categories with the most significant decreases in August were fresh non-citrus fruit (down \$38.0 million or 24 percent), miscellaneous products (down \$14.4 million or 7 percent), and fresh vegetables (down \$11.5 million or 16 percent). The categories with the most significant increases were tree nuts (up \$24.7 million or 29 percent) and wine (up \$9.4 million or 26 percent). For FY 1998 to date (October-August), the total value of U.S. horticultural exports was \$9.5 billion--1 percent below FY 1997 during the same time period.

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All measures not otherwise noted are metric. One kilogram (kg.) = 2.2046 pounds,  
1 metric ton = 2,204.62 pounds, 1 liter = 0.2642 gallon,  
1 hectoliter (hl.) = 26.42 gallons, and 1 hectare (ha.) = 2.471 acres.

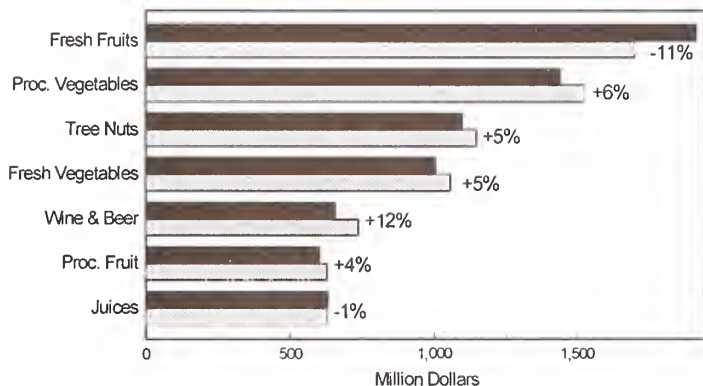
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# U.S. Horticultural Product and Market Export Summaries

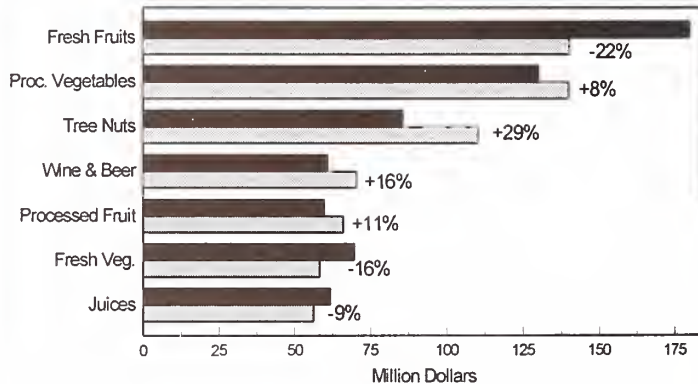
FY98 and Latest Month (August) Comparisons ■ FY97 □ FY98

## Selected Product Summary

--Year-to-date--

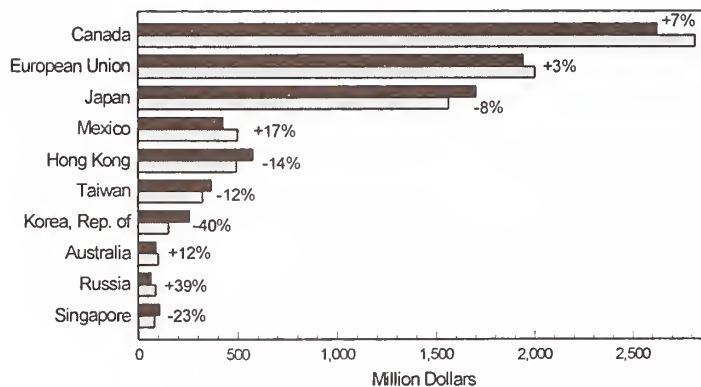


--Latest month--

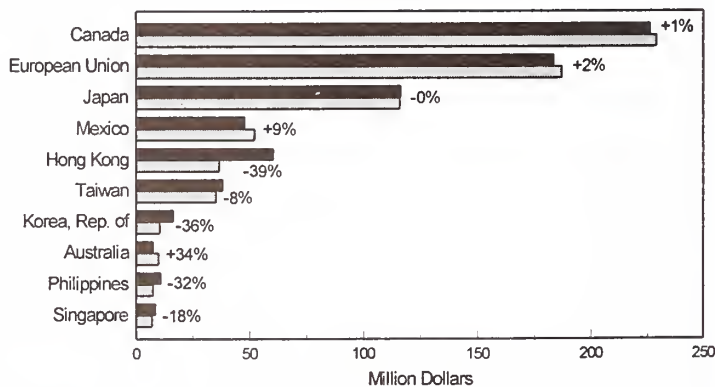


## Top Ten Market Summary

--Year-to-date--



--Latest month--





## U.S. Exports of Selected Horticultural Products

Name		Quantity					Values (1000 Dollars)				
		Aug	Aug	Oct-Aug	Oct-Aug	Oct-Sep	Aug	Aug	Oct-Aug	Oct-Aug	Oct-Sep
Group	& Product	FY 1997	FY 1998	FY 1997	FY 1998	FY 1997	FY 1997	FY 1998	FY 1997	FY 1998	FY 1997
Fresh Citrus MT											
	Grapefruit	6,131	5,942	476,336	384,355	484,403	3,011	3,563	236,234	187,918	240,408
	Lemons	4,799	5,447	115,302	109,452	120,279	7,586	3,911	112,727	81,049	120,656
	Oranges, Incl. Tm	21,534	26,021	572,949	619,691	590,428	13,013	14,247	312,793	349,229	323,203
	Other Citrus	339	348	28,209	29,724	28,696	277	271	23,474	22,983	23,786
	Subtotal:----	32,803	37,758	1,192,796	1,143,222	1,223,805	23,887	21,992	685,228	641,180	708,053
Fresh Fruit, Non-Citrus MT											
	Apples	45,568	34,886	662,702	510,722	689,749	26,638	21,265	393,918	310,596	412,371
	Avocados	190	783	5,615	2,817	5,819	297	770	7,875	3,824	8,215
	Cherries Swt &trt	1,959	1,109	38,499	36,910	39,400	5,237	2,248	139,346	113,294	140,144
	Grapes	42,218	20,536	169,454	168,617	233,558	52,964	28,443	238,756	221,346	309,727
	Kiwifruit	97	82	5,381	5,608	5,438	110	118	6,966	7,055	7,036
	Melons	35,117	34,306	207,306	188,727	219,681	10,834	11,098	74,039	72,377	79,289
	Papaya	402	418	6,117	5,405	6,589	1,075	1,016	15,581	13,553	16,738
	Peaches & Nectrns	24,981	21,980	94,630	63,412	103,345	21,161	17,914	84,554	59,615	92,737
	Pears	10,660	9,164	111,175	145,745	126,409	6,047	5,403	67,670	80,273	76,052
	Plums/Prunes	16,745	16,566	60,789	37,821	71,906	14,625	15,621	52,103	36,959	61,224
	Strawberries	5,591	4,586	49,043	45,334	52,615	11,680	9,041	87,571	83,787	97,010
	Other Non-Citrus	3,609	4,071	49,493	47,166	54,810	5,822	5,506	66,637	60,540	75,169
	Subtotal:-----	187,138	148,487	1,460,204	1,258,283	1,609,320	156,491	118,444	1,235,016	1,063,220	1,375,713
Can/Prep Fruit MT											
	Cherries, Tart Cn	245	274	4,567	2,997	4,916	289	315	5,922	4,004	6,338
	Fruit Mixtures	1,192	1,618	20,414	20,946	22,475	1,353	1,949	24,669	26,009	27,055
	Marachino Cherry	456	614	4,564	4,438	5,107	915	1,099	9,461	8,663	10,672
	Peaches, Canned	1,124	1,994	15,233	19,096	16,873	1,013	2,074	14,900	18,103	16,528
	Pineapple, Canned	252	318	3,468	3,846	3,694	233	298	3,208	3,722	3,443
	Other Canned Frui	3,986	3,891	41,361	54,445	45,120	4,465	4,790	47,992	59,397	51,682
	Other Prep/Preser	5,665	7,318	71,580	86,893	79,816	6,363	7,837	73,784	81,342	83,397
	Subtotal:-----	12,921	16,028	161,187	192,661	178,001	14,631	18,361	179,935	201,241	199,114
Oried Fruit MT											
	Prunes, Oried	5,365	5,715	61,112	64,150	67,535	10,233	10,703	125,544	121,114	138,398
	Raisins, Oried	10,034	11,413	102,603	109,580	115,016	18,551	18,926	181,653	182,444	203,954
	Other Oried Fruit	1,683	1,346	15,445	17,091	17,313	3,829	3,498	45,018	47,903	50,290
	Subtotal:-----	17,082	18,475	179,160	190,822	199,864	32,613	33,126	352,215	351,460	392,641
Frozen Fruit MT											
	Blueberries, Froz	7,582	9,323	13,873	17,329	16,281	6,642	8,283	19,548	23,342	22,468
	Strawberries, Fro	2,219	2,535	19,553	21,393	21,748	2,812	3,092	24,911	27,578	27,686
	Other Frozen Frui	2,460	2,399	20,396	17,379	22,046	3,111	3,417	26,378	24,245	28,524
	Subtotal:-----	12,261	14,257	53,823	56,102	60,075	12,565	14,792	70,837	75,164	78,677
Fruit/Veg Juices KL											
	Grapefruit Ju. Cn	5,649	4,077	58,796	46,635	62,477	2,866	2,782	38,954	31,710	41,493
	Orange Juice, Con	45,952	15,994	356,639	300,051	381,926	18,903	8,801	166,957	138,067	177,635
	Orange Juice, Not	15,617	22,538	164,009	206,157	178,921	10,403	14,201	114,491	128,537	124,874
	Other Juices	42,041	43,493	422,936	471,668	467,575	29,755	30,555	311,620	328,501	340,694
	Subtotal:-----	109,259	86,103	1,002,381	1,024,511	1,090,899	61,928	56,338	632,023	626,815	684,695
Fresh Vegetables MT											
	Potatoes	19,260	19,442	284,930	284,332	299,259	5,807	4,870	75,393	85,112	79,753
	Asparagus, Fr. Ch	570	281	14,928	15,281	15,160	2,867	1,104	49,824	44,741	50,688
	Broccoli	8,374	7,674	124,528	120,433	130,391	6,215	5,547	87,161	85,885	92,215
	Cauliflower	5,209	3,701	84,285	73,579	88,279	3,324	2,342	54,982	52,849	57,828
	Celery	5,951	4,840	112,154	116,368	117,410	2,831	1,803	46,531	46,408	48,961
	Lettuce, Fr Chld	16,210	16,446	279,312	286,628	294,482	9,452	8,506	137,968	165,175	146,612
	Onions	26,446	24,746	239,017	263,065	265,121	8,961	9,084	84,830	97,684	92,464
	Peppers	2,572	2,695	60,583	54,294	62,493	1,976	2,332	50,767	55,302	52,240
	Tomatoes	19,865	10,850	141,861	124,424	153,650	13,370	7,451	115,859	115,059	123,783
	Other Vegetables	18,262	17,602	461,663	411,711	480,790	15,071	15,370	302,567	310,595	323,221
	Subtotal:-----	122,720	108,277	1,803,263	1,750,116	1,907,035	69,876	58,407	1,005,883	1,058,808	1,067,765

## U.S. Exports of Selected Horticultural Products

Name		Quantity					Values (1000 Dollars)				
Group & Product		Aug	Aug	Oct-Aug	Oct-Aug	Oct-Sep	Aug	Aug	Oct-Aug	Oct-Aug	Oct-Sep
		FY 1997	FY 1998	FY 1997	FY 1998	FY 1997	FY 1997	FY 1998	FY 1997	FY 1998	FY 1997
<b>Veg Canned MT</b>											
Ketchup		3,276	4,281	37,307	39,357	40,186	2,463	2,755	28,565	27,229	30,568
Sweet Corn, Canne		10,225	13,423	190,453	160,064	203,469	8,340	10,599	156,798	130,387	167,353
Tomato Paste		11,524	5,695	118,985	114,743	128,954	7,446	4,432	82,388	79,485	89,320
Tomato Sauce		7,707	9,234	79,931	97,019	88,108	7,403	8,354	77,174	89,799	84,947
Other Can Veg		24,189	25,830	248,811	257,642	271,139	29,780	29,252	312,170	307,264	339,901
Subtotal:----		56,922	58,462	675,487	668,824	731,855	55,432	55,391	657,095	634,164	712,088
<b>Frozen Vegetables MT</b>											
Frozen French Fry		34,057	37,877	366,124	402,587	396,674	25,623	27,416	272,530	286,496	294,335
Fzn Swt Corn		4,714	5,684	58,398	71,215	65,202	4,232	4,574	50,914	58,013	56,212
Other Pot Fzn		1,501	1,524	27,627	20,481	28,798	1,291	1,429	19,887	18,077	20,957
Other Fzn Veg		5,981	6,873	66,437	77,060	72,443	5,066	5,932	60,331	69,070	65,425
Subtotal:----		46,253	51,959	518,587	571,343	563,117	36,212	39,351	403,663	431,657	436,929
<b>Veg, Dehyd MT</b>											
Garlic Oehyd.		1,032	1,130	10,751	10,444	11,820	2,311	2,550	23,731	23,702	26,182
Onions, Oehyd.		3,453	2,999	30,444	29,590	33,170	7,948	7,091	71,349	68,465	77,600
Potatoes, Oehyd		4,204	4,196	44,607	42,639	49,903	4,196	3,951	45,331	42,050	49,997
Other Oehyd Veg		7,607	6,626	65,259	71,952	71,944	12,399	11,425	103,592	120,326	114,690
Subtotal:----		16,296	14,952	151,061	154,626	166,836	26,854	25,017	244,003	254,544	268,469
<b>Tree Nuts MT</b>											
Almonds, Unshld		3,340	2,687	17,625	24,548	24,735	8,309	7,583	42,877	66,672	63,658
Pistachio, Unshld		553	543	4,926	13,816	5,955	2,799	2,242	22,387	59,581	27,193
Walnuts, Shld		1,469	1,329	22,237	21,577	23,936	4,399	5,220	68,870	71,567	73,476
Walnuts, Unshld		162	532	49,548	39,582	57,187	248	997	105,778	74,741	121,757
Other Nuts		4,444	7,004	59,987	91,436	67,140	13,263	18,901	173,006	233,481	190,950
Almonds, Sh/Prep		12,023	18,219	133,594	162,875	163,576	56,742	75,512	687,297	643,705	816,088
Subtotal:----		21,991	30,313	287,915	353,834	342,529	85,760	110,455	1,100,215	1,149,746	1,293,123
<b>Nusery Products MIXEO</b>											
Cut Flowers		0	0	0	0	0	3,893	3,544	44,729	41,280	49,067
Other Nursery		0	0	0	0	0	9,926	9,189	160,202	193,665	172,279
Subtotal:----		0	0	0	0	0	13,819	12,732	204,931	234,944	221,346
<b>Hops &amp; Products MT</b>											
Hop Extract		159	197	3,040	3,025	3,468	2,916	3,044	50,960	48,760	57,080
Hop Pellets		251	253	5,863	5,297	6,120	1,327	1,320	32,240	27,710	33,737
Hops, NFsp		53	21	1,826	1,582	1,888	214	86	9,040	8,497	9,644
Subtotal:----		463	471	10,730	9,904	11,477	4,456	4,450	92,240	84,967	100,462
<b>Wine KL</b>											
Grape Wines		17,382	21,853	175,341	228,045	194,399	33,974	43,706	329,404	442,330	368,160
Other Wine Prod		1,320	1,089	12,999	15,827	14,294	2,090	1,730	19,435	24,206	22,060
Subtotal:----		18,702	22,942	188,339	243,872	208,693	36,064	45,436	348,839	466,536	390,220
<b>Miscellaneous MIXEO</b>											
Beer & Beverages		50,064	53,275	614,457	538,784	664,850	30,991	33,859	384,317	354,553	416,546
Edible Preparatio		18,577	17,436	192,395	202,617	211,356	74,689	66,281	850,643	765,780	933,748
Essential Oils		3,603	3,415	42,892	42,248	46,266	41,804	43,782	569,071	489,441	619,388
Ginseng		26	58	930	795	993	1,347	1,734	70,000	43,545	72,001
Potato Chips		4,314	10,364	48,833	91,386	53,599	11,417	20,047	132,781	202,275	145,451
Other Misc		0	0	0	0	0	50,204	30,300	447,666	405,564	481,787
Subtotal:----		76,583	84,549	899,507	875,831	977,065	210,453	196,004	2,454,478	2,261,158	2,668,921
Grand Total:							841,041	810,298	9,666,599	9,535,603	10,598,216



## U.S. Imports of Selected Horticultural Products

Name		Quantity					Values (1000 Dollars)				
Group	& Product	Aug	Aug	Oct-Aug	Oct-Aug	Oct-Sep	Aug	Aug	Oct-Aug	Oct-Aug	Oct-Sep
		FY 1997	FY 1998	FY 1997	FY 1998	FY 1997	FY 1997	FY 1998	FY 1997	FY 1998	FY 1997
Fresh Fruit MT											
	Apples	13,289	9,845	161,692	151,338	168,564	7,854	5,665	80,762	74,703	82,736
	Avocados	1,390	5,325	22,736	28,620	27,667	1,392	5,182	21,060	31,413	25,993
	Bananas	316,257	362,118	3,405,611	3,635,354	3,727,906	92,436	105,471	1,033,773	1,016,827	1,122,747
	Cantaloupe	773	0	395,043	443,404	396,103	169	0	130,105	128,814	130,376
	Grapes	33	506	350,599	416,878	351,567	44	119	385,822	439,636	386,183
	Kiwifruit	2,414	6,170	35,268	37,358	37,680	1,412	5,001	22,069	26,492	23,524
	Mangoes	19,040	16,113	187,702	186,148	191,115	7,592	10,129	121,163	123,030	123,009
	Peaches	60	149	41,418	6,931	41,672	67	153	32,668	6,602	32,901
	Pears	5	73	78,229	67,305	78,521	10	58	50,041	45,792	50,306
	Pineapples	15,161	22,014	150,325	232,891	171,253	5,369	7,435	66,158	75,370	74,441
	Strawberry	9	13	15,196	25,851	15,203	29	45	26,822	65,798	26,844
	Other Melons	3	69	382,373	416,982	382,903	4	66	96,047	122,069	96,126
	Other Fruit	61,067	62,748	529,182	562,619	572,146	39,441	44,537	280,922	312,591	297,914
	Subtotal:....	429,500	485,144	5,755,373	6,211,677	6,162,300	155,820	183,861	2,347,413	2,469,137	2,473,098
Dried Fruit MT											
	Dried Apricots	746	394	9,829	11,376	11,237	2,066	952	27,433	29,817	31,058
	Drd Figs & Pst	399	107	3,410	4,369	3,904	401	202	5,211	5,534	5,800
	Other Dried Fruit	5,449	2,341	24,751	20,911	26,720	5,308	4,209	39,190	33,322	42,783
	Subtotal:....	6,594	2,842	37,990	36,656	41,862	7,776	5,363	71,834	68,673	79,640
Frozen Fruit MT											
	Fzn Blueberries	1,642	1,901	11,822	11,839	13,177	2,888	3,261	23,549	22,452	26,173
	Fzn Strawberries	414	559	21,909	18,457	22,279	430	693	19,603	21,203	20,207
	Other Fzn Fruit	4,101	4,462	33,461	28,343	35,774	4,253	4,709	39,314	31,979	41,924
	Subtotal:....	6,157	6,922	67,192	58,639	71,230	7,571	8,662	82,465	75,634	88,304
Canned/Prep Fruit MT											
	Canned Olives	10,655	11,818	74,593	83,462	81,516	18,869	17,315	171,932	168,084	184,250
	Canned Oranges	4,472	6,601	52,475	61,648	56,289	4,134	5,266	51,212	49,192	54,784
	Canned Peaches	1,856	979	27,596	16,607	29,483	1,218	834	18,502	11,675	19,709
	Canned Pineapples	28,264	18,514	262,700	235,064	292,609	20,066	13,239	183,625	170,752	204,974
	Mixed Fruit	2,879	2,669	46,400	53,727	49,307	3,820	3,403	47,543	54,263	51,241
	Prep/Pres Fruit	6,994	7,941	94,692	89,871	101,420	7,921	8,454	110,138	103,203	118,537
	Other Canned Frui	6,256	5,088	62,419	54,653	69,225	7,826	5,791	76,169	70,230	84,661
	Subtotal:....	61,376	53,611	620,875	595,031	679,851	63,853	54,302	659,121	627,398	718,155
Frt&Veg Juice SSE KL											
	Apple Juice	64,305	75,773	1,047,908	935,221	1,084,986	18,782	15,051	343,111	214,076	354,632
	Fcoj	85,869	84,307	1,026,773	987,807	1,099,876	15,150	19,262	219,541	189,982	233,077
	Grape Juice	39,887	5,606	220,480	122,455	243,290	14,964	2,829	86,527	54,624	95,051
	Pineapple Juice	24,259	17,150	277,247	223,546	303,510	7,008	4,957	81,437	68,421	88,786
	Other Juices	24,031	20,720	276,462	223,813	293,196	12,873	10,195	156,873	109,580	167,223
	Subtotal:....	238,351	203,555	2,848,870	2,492,842	3,024,858	68,777	52,294	887,490	636,683	938,770
Fresh Vegetables MT											
	Garlic	553	2,066	17,178	29,101	17,570	752	2,446	20,112	34,585	20,661
	Asparagus	3,954	3,303	35,365	43,026	38,745	6,268	5,076	60,762	81,127	66,588
	Bell Pepper	5,349	7,197	172,706	185,752	180,463	8,089	11,391	197,961	240,598	206,072
	Carrots	7,348	6,197	89,713	85,965	99,470	2,109	1,832	20,108	21,871	22,353
	Chili Pepper	12,990	14,585	89,042	106,376	103,758	4,260	8,400	41,752	82,186	45,836
	Cucumbers	5,608	9,527	297,496	322,194	302,306	3,073	4,556	97,801	151,255	100,823
	Onions	5,355	8,976	254,134	249,503	261,088	4,844	5,088	122,243	147,338	127,447
	Potatoes	7,365	7,759	302,281	454,777	324,924	1,505	1,567	54,689	91,305	59,301
	Squash	2,683	2,315	139,871	155,174	141,192	981	906	87,309	103,876	87,857
	Tomatoes	30,585	42,611	715,373	822,460	743,205	26,372	37,495	590,021	704,480	611,612
	Other Fresh Veg	37,534	31,137	415,744	496,543	453,475	20,069	19,050	245,470	325,011	265,485
	Subtotal:....	119,323	135,671	2,528,902	2,950,870	2,666,196	78,323	97,806	1,538,229	1,983,633	1,614,035

## U.S. Imports of Selected Horticultural Products

Name		Quantity					Values (1000 Dollars)				
Group	& Product	Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-5ep FY 1997	Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-5ep FY 1997
Canned/Dehyd Vegetables MT											
	Cnd Artichokes	2,780	2,943	27,075	35,239	29,298	3,884	6,370	40,746	65,194	44,069
	Cnd Bamboo	2,090	3,763	23,757	26,200	27,077	1,871	2,857	21,760	20,256	24,292
	Cnd Mushrooms	5,142	2,677	62,735	59,096	67,258	9,177	5,254	109,956	99,090	118,324
	Cnd Pimiento	837	1,176	8,372	11,550	9,556	955	1,478	10,026	14,545	11,448
	Cnd Tomatoes	4,055	6,055	59,680	66,074	65,589	1,707	3,560	25,363	33,479	27,979
	Cnd Waterchnuts	3,955	3,407	32,771	32,461	35,531	2,888	1,995	25,469	19,516	27,403
	Tomato Pst & Sauc	1,261	1,131	31,311	23,655	33,659	1,966	1,176	39,339	26,635	41,356
	Oried Mushrooms	170	103	1,952	1,857	2,015	1,631	949	18,474	17,524	19,411
	Oried Tomatoes	412	0	6,058	3,985	6,924	1,599	0	23,137	14,806	26,265
	Other Oehy Veg	10,716	13,775	147,273	150,913	159,374	12,137	15,018	145,543	141,594	159,001
	Other Can Veg	20,413	25,160	223,395	267,052	244,159	17,951	20,804	195,454	224,781	214,284
	Subtotal:----	51,831	60,191	624,380	678,084	680,441	55,765	59,461	655,268	677,420	713,831
Frozen Vegetables MT											
	Broccoli Fzn	11,293	12,309	154,181	141,885	169,458	7,364	9,015	96,231	93,080	106,080
	Cauliflower Fzn	620	951	17,271	22,442	18,729	465	750	12,943	16,431	14,060
	Potato Fzn	20,132	22,450	265,131	346,876	286,808	11,602	13,609	156,439	214,198	169,323
	Other Veg Fzn	28,131	17,253	197,913	177,642	222,015	8,988	10,952	119,558	130,016	129,143
	Subtotal:----	60,176	52,962	634,496	688,844	697,010	28,418	34,326	385,171	453,726	418,606
Tree Nuts MT											
	Brazils Tot	1,028	593	9,238	9,800	10,404	2,574	1,607	20,916	23,297	23,656
	Cashews Tot	5,658	8,138	57,290	68,226	62,669	26,389	38,631	267,506	309,594	292,315
	Coconut	3,070	3,636	36,309	35,601	39,782	2,314	2,448	31,973	24,462	34,791
	Pecans	366	671	19,685	22,822	19,909	2,053	2,937	38,504	66,964	39,667
	Other Nuts	851	688	17,336	16,047	18,167	3,653	2,489	74,124	70,409	78,070
	Subtotal:----	10,973	13,726	139,858	152,497	150,931	36,982	48,112	433,022	494,726	468,499
Nursey Products MIXEO											
	Carnations	76,384	51,845	1,137,666	1,037,692	1,211,423	7,450	5,177	107,345	108,915	115,014
	Christmas Trees	0	0	2,258	2,585	2,260	0	0	20,220	22,177	20,227
	Chrysanthemus	42,013	37,760	568,761	571,900	614,707	6,815	6,635	83,475	88,242	91,126
	Roses	61,100	48,392	859,466	964,536	919,298	12,055	8,922	189,235	226,647	200,957
	Tulip Bulbs	226,504	187,544	321,882	289,186	426,485	18,771	19,106	29,756	30,228	41,993
	Other Cut Flowers	0	0	0	0	0	12,218	10,905	172,526	189,426	186,894
	Other Nursey Prod	0	0	0	0	0	29,640	33,300	266,926	310,684	298,973
	Subtotal:----	406,000	325,541	2,890,033	2,865,899	3,174,174	86,950	84,044	869,482	976,318	955,183
Hops & Products MT											
	Hops & Pellets	128	20	5,605	4,653	5,606	260	43	37,827	29,289	37,836
	Other Hop Prod	0	0	187	209	187	0	0	1,339	879	1,339
	Subtotal:----	128	20	5,792	4,862	5,793	260	43	39,166	30,168	39,175
Wine KL											
	Red Wine	15,819	14,914	166,815	184,394	181,724	58,314	64,977	629,026	770,322	682,741
	Sparkiling Wine	2,837	2,806	26,632	28,907	30,293	31,214	32,996	297,114	335,468	336,614
	White Wine	10,322	10,047	106,574	115,446	116,091	34,915	38,029	379,098	421,635	411,457
	Other Wine Prod	11,653	3,845	93,838	68,646	104,101	19,421	11,142	180,665	159,543	198,476
	Subtotal:----	40,631	31,613	393,859	397,393	432,208	143,865	147,145	1,485,903	1,686,968	1,629,287
Miscellaneous MIXEO											
	Beer & Beverages	164,545	189,733	1,581,694	1,813,001	1,734,830	142,189	163,818	1,377,290	1,577,836	1,511,285
	Other Misc	0	0	0	0	0	120,230	136,413	1,276,850	1,520,837	1,402,504
	Subtotal:----	164,545	189,733	1,581,694	1,813,001	1,734,830	262,419	300,232	2,654,141	3,098,673	2,913,790
	Grand Total:						996,780	1,075,650	12,108,705	13,279,159	13,050,374

## WORLD TRADE SITUATION AND POLICY UPDATES

### **Organics in Austria**

Organic foods constitute about 5% of the volume, and 2% (\$US200 million) of the value of total food consumption in Austria. Organic prices are 10-20% higher than conventional products although prices for organic meat and meat products are about 50% higher. Austria's two largest supermarket chains now carry 150-200 organic products and both feature a line of their own-brand items. Billa, the larger of the two chains, stocks their shelves with organic products grown under contract by 1,400 certified organic growers. Organic products are considered prestige items and are sold in separate sections of the store instead of side-by-side with conventional products.

Imports account for about 30 percent of total organic food sales. A large share of fresh organic fruits and vegetables found in the Austrian market are grown under contract in Hungary and the Czech Republic. Other sources include Italy—citrus; New Zealand—kiwi; South America—avocados; and Israel—fruits and vegetables. EU countries also provide a variety of organic products.

Approximately 20,000 farms (10% of all farms) are certified organic, and account for about 300,000 hectares (750,000 acres). Major products include grains, fruits, vegetables, poultry and livestock products. Austria's major organic export category is dairy products destined for Germany. Organic food processing is relatively undeveloped in Austria although there is some domestic production of ready-to-eat meals, a line of baby food, flour and bakery products, and frozen foods.

With long vacations and high personal incomes, Austrians increasingly are traveling overseas where they sample new cuisines. This trend has resulted in an increase in ethnic restaurants in Austria. Tex-Mex is overtaking Chinese as the latest trend in eating out, creating potential

opportunities for U.S. processed organic products. Other U.S. organic products that show promise in the health-conscious Austrian market include rice, nuts, fruits—particularly citrus and dried fruits, kamut (an ancient variety of wheat), and processed foods.

*Source: Attache Reports AU8031 of 7-27-98 and AU8039 of 8-25-98.*

For more stories on organics, see HTP's monthly newsletter "Organic Perspectives," available at the HTP home page at:

<http://www.fas.usda.gov/http/organics/organics.html>

The newsletter contains reports on organics from around the world gleaned from attache reports, trips made by the HTP organics staff, and other sources. The newsletter also covers items of interest about the U.S. national organic program and the domestic organic industry. A list of upcoming conferences, trade shows and other events is included in every issue.

### **Timely Israeli TRQ announcement should boost FY 1999 U.S. export prospects for dried fruits and tree nuts**

It was announced at the Joint Economic Commission meeting on September 14 that Israel had published most of the 1999 TRQ's for food and agricultural products, including raisins, prunes, and tree nuts. The Ministry of Agriculture also announced that the licences under the TRQ's will be distributed by the end of October. In previous years, the announcement and issuance of licenses have come so late that key marketing opportunities during the important Israeli holidays were limited, or even completely missed, leading some Israeli importers to complain about lost sales.

Consumption of dried fruits and tree nuts in Israel is considerable and the market of approximately 5.5 million people has a favorable attitude towards U.S. products.

Although exports of certain key products have been limited by the small TRQ's, U.S. exports of dried fruit has increased recently. For example, the value of U.S. prune exports to Israel increased 7 percent in marketing year 1997/98 (August/July) to reach \$2.1 million. U.S. raisin exports rose 14 percent (volume basis) in 1997/98, with an associated value of \$2.2 million.

#### **Taiwan bans imports of citrus from two California counties**

Taiwan's plant quarantine agency has banned imports of citrus from Orange County and San Diego County, California, in the wake of the September Medfly detections, according to the U.S. Agriculture Officer in Taipei. This action follows the previously reported move by Korea to block the export of citrus from all of San Diego County, while limiting the Orange County embargo to the established regulated quarantine zone. U.S. exports of fresh citrus to Taiwan were valued at \$18.5 million in CY1997, with fresh oranges accounting for 42 percent (\$8 million) of that total.

#### **Korea applies restrictive quarantine policy to U.S. citrus**

Korea's government has recently adopted a new, restrictive quarantine policy for U.S. citrus. Specifically, following the Mediterranean fruit fly detections in Florida, Korea's plant quarantine agency, NPQS, banned imports of citrus from the entirety of the affected counties. In the case of California, NPQS has recognized APHIS's science-based regulated quarantine zone established in response to the detection in Orange County, and is prohibiting imports of product originating from within that zone. However, NPQS is simultaneously rejecting the regulated zone established following the detections near La Jolla and is embargoing all of San Diego county.

In a September 3 meeting with APHIS and FAS officials in Seoul, NPQS officials pointed to a regulation enacted in June 1998 as providing

the basis for the actions taken. The regulation reportedly provides for acceptance of the standard regulated zone in instances where the number of flies captured are few, while requiring the embargoing of the entire affected county in cases where a large number of flies are found.

Despite the frequent trade difficulties encountered in Korea, and that country's current economic downturn, U.S. exports of citrus to the market remain significant. Through the first 11 months of FY1998, U.S. citrus shipments to Korea were valued at \$27 million, compared to about \$7 million during the same period five years ago. Fresh oranges accounted for over 90 percent of the total value of year-to-date FY1998 shipments.

#### **Lettuce marketing opportunity in Japan muted by restrictive quarantine policy**

Sharply reduced domestic supplies of lettuce in Japan, due to an active typhoon season, has led to a shortage and a drastic run up in wholesale prices, according to a report from the U.S. Agricultural Minister-Counselor's office in Tokyo. Japanese traders are now reported to be looking to offshore suppliers to help fill the void, including the United States which has been Japan's leading foreign supplier of fresh lettuce. However, MAFF's current restrictive quarantine policy will sharply constrain U.S. exporters' ability to take advantage of this marketing opportunity.

MAFF's policy continues to result in the detention and subsequent fumigation of a large percentage of U.S. lettuce shipments (approximately 40%) due to the detection of live insects. The fumigation process effectively destroys the delicate commodity. Despite the highly restrictive policy, and the associated high risk of doing business under such conditions, U.S. exporters continue to try and tap into this potentially lucrative market. U.S. lettuce shipments to Japan in 1997 totaled 3,435 MT, valued at \$3.2 million. The United States is the predominant foreign supplier of lettuce to Japan, where imported lettuce



continues to account for less than 1 percent of domestic consumption. USDA and industry efforts to overcome Japan's restrictive quarantine policy are ongoing.

## **EXPORT NEWS AND OPPORTUNITIES**

### **U.S. horticultural product exports to Mexico will set a record in fiscal year 1998**

U.S. horticultural exports to Mexico are poised to set a record in FY1998, surpassing the record reached in FY1994, just before the December 1994 peso devaluation. Through the first 11 months of FY1998, the value of total U.S. horticultural exports to Mexico was running 17 percent ahead of the same period in FY1997. Mexico is the fifth largest U.S. horticultural market. Booming exports to our two NAFTA partners (Canada is the number one market) are offsetting lower exports to Japan and other Asian countries, keeping FY1998 U.S. horticultural exports within striking distance of their FY1997 record total to all destinations.

Total horticultural exports were valued at \$503 million for the period October 1997 through August 1998, up almost 17 percent from the same period a year ago. The processed fruit and vegetable group (valued at \$161 million) registered the largest increase (up almost 45 percent), led by dried, frozen, and canned vegetables. Tree nuts, valued at \$24 million, were up almost 40 percent compared with the period October-August 1997. Fresh fruits and vegetables were valued at \$127 million, up 4 percent.

On the negative side, shipments of wine decreased 35 percent from October-August 1997. The retaliatory tariffs imposed by Mexico in 1996 on U.S. wine have turned back the earlier registered gains. Apple shipments for the October-August 1998 period were down more than 25 percent from the same period in 1997. U.S. shipments of Red and Golden Delicious apples were hampered in the early part of the fiscal year by Mexico's punitive

101.1 antidumping duty. While that issue was settled in March, exports continue to lag from previous year levels due to a minimum price provision that is temporarily indirectly allowing Chilean apples to grab former U.S. market share.

### **USDA and industry troubleshooting efforts improve outlook for U.S. apples to Finland**

During the week of September 7-11, 1998, two senior level Finnish Customs officials, accompanied by a FAS/HTP staff member, visited the Pacific Northwest to observe apple production, packing, and inspection procedures. The FAS representative had earlier traveled to Helsinki to discuss the U.S. apple situation with the same two Finnish officials. The visit provided an excellent opportunity for the two sides to exchange further information and views on quality control and inspection procedures. Besides providing all parties a better understanding of the two countries' respective systems, the positive professional relationships fostered with the Finnish officials should serve the U.S. side well if future apple shipments encounter difficulties. The U.S. Agricultural Counselor in Stockholm, who covers Finland, was actively involved from the outset in attempting to resolve this export problem. As a result of USDA (FAS & AMS) and industry efforts, along with an overall better quality 1998 apple crop, a repeat of last year's trade problems is not foreseen.

Last season, a number of Washington State apple shipments that arrived in Finland were either rejected, diverted to processing, or had their quality rating downgraded, due to unusually strict interpretation of the EU's grade classifications. The situation adversely affected about 25 percent of the shipments the United States exported to Finland during the marketing season. U.S. apple exports to Finland in 1997/98 (July-June) totaled 2,866 metric tons, valued at \$1.4 million, down 35 percent in volume and 31 percent in value from 1996/97 shipments. The bulk of U.S. apple shipments to Finland occurs during the months of November and December, as Finnish demand

peaks during the Holiday season. Red and Golden delicious varieties account for most of the U.S. apples shipped to Finland annually.

### **USDA Announces \$3.5 Billion in FY 1999 GSM-102 Programs**

As of October 16, the United States Department of Agriculture (USDA) has authorized credit guarantees for sales of U.S. agricultural products to 36 countries. Agriculture Secretary Dan Glickman announced \$3.5 billion for the FY 1999 GSM-102 programs. These programs will ensure that American farm and food products continue to move to emerging markets around the world, including several troubled Asian markets. The table on page 14 presents FY 1999 GSM-102 programs for which USDA has authorized credit guarantees for sales of U.S. horticultural products as of October 16, 1998. Specific dollar amounts are not assigned to commodities in order to provide buyers and sellers maximum flexibility in arranging the size of their transactions within the scope of the overall allocation. Exporters may apply for credit guarantees on a first-come-first-served basis to cover sales of any of the eligible commodities.

On September 8, USDA issued a list of commodities eligible for coverage under the FY 1999 Export Credit Guarantee Programs (GSM-102) and Supplier Credit Guarantee Programs. This list of eligible commodities will apply to all individual country and regional announcements unless otherwise stated in the announcements. The following horticultural products are eligible under the export credit guarantee programs for FY 1999: dried fruit; fresh fruit; 100 percent fruit juices; fruit and vegetable concentrates, pastes, pulps and purees; honey; hops or hops extract; tree nuts canned vegetables; dried vegetables; wine; and brandy. From time to time, this list may be amended as additional commodities become eligible.

The GSM-102 program makes available financing for the sales of U.S. agricultural commodities overseas. USDA does not provide financing, but guarantees payments due from

foreign banks. USDA typically guarantees 98 percent of the principal and a portion of the interest. The GSM-102 program covers credit terms from 90 days to 3 years.

Under the program, once a firm sale exists, the qualified U.S. exporter applies for a payment guarantee before the date of export. The U.S. exporter pays a fee calculated on the dollar amount guaranteed, based on a schedule of rates applicable to different lengths of credit periods. The CCC-approved foreign bank issues a dollar-denominated, irrevocable letter of credit in favor of the U.S. exporter, ordinarily advised or confirmed by the financial institution in the United States agreeing to extend credit to the foreign bank. The U.S. exporter may negotiate an arrangement to be paid as exports occur by assigning the U.S. financial institution the right to proceeds that may become payable under the guarantee, and later presenting required documents to that financial institution. Such documents normally include a copy of the export report.

If a foreign bank fails to make any payment as agreed, the exporter or the assignee may file a claim with USDA for the amounts due and covered by the guarantee. USDA will pay the U.S. bank and will take on the responsibility of collecting the overdue amount from the foreign bank.

Additional information about the GSM-102 program, regulations, country specific press releases and program announcements, and a Monthly Summary of Export Credit Guarantee Program Activity may be accessed on the Internet at:

<http://www.fas.usda.gov/excredits/exp-cred-guar.html>

### **USDA Announces \$321 Million in Supplier Credit Guarantees for FY 1999**

As of October 16, USDA has announced 16 Supplier Credit Guarantee Programs for FY 1999. These program allocations total \$321 million. Exporters may apply for credit



guarantees on a first-come-first-served basis to cover sales of any of the eligible commodities. The following horticultural products are eligible under the SCGP: dried fruit; fresh fruit; 100 percent fruit juices; fruit and vegetable concentrates, pastes, pulps and purees; honey; hops or hops extract; tree nuts canned vegetables; dried vegetables; wine; and brandy. This list of eligible commodities will apply to all individual country and regional SCGP announcements unless otherwise stated in the announcements.

The SCGP is unique because it covers short-term financing extended directly by U.S. exporters to foreign buyers and requires that the importers sign a promissory note in case of default on the CCC-backed payment guarantee. The SCGP emphasizes high-value and value-added products, but may include commodities or products that also have been programmed under the GSM-102 program.

The table on page 15 presents the FY 1999 SCGPs for which USDA has authorized credit guarantees for sales of U.S. horticultural products as of October 16, 1998. Additional information about the SCGP, regulations, country specific press releases and program announcements, and a Monthly Summary of Export Credit Guarantee Program Activity may be accessed on the Internet at:

<http://www.fas.usda.gov/excredits/scgp.html>

**Note:** The GSM will consider requests to establish a SCGP and/or GSM Program for a country or region or amend an authorized program to include horticultural commodities and products which are currently not eligible.

(For further information on the SCGP or GSM-102 Program for horticultural commodities, contact Yvette Wedderburn Bomersheim, 202-720-0911).

## FY 1999 GSM-102 CREDIT GUARANTEE COVERAGE 1/

Country	Announced Allocation (In Millions of Dollars)
ANDEAN REGION	350.0
ARGENTINA	7.0
AZERBAIJAN	5.0
BALTIC REGION	15.0
BRAZIL	155
CENTRAL AMERICA REGION	110.0
CENTRAL EUROPE REGION	10.0
CHINA	200.0
EAST AFRICA REGION	35.0
EAST CARIBBEAN REGION	60.0
EGYPT	100.0
GEORGIA	5.0
INDIA	20.0
INDONESIA	400.0
JORDAN	60.0
KAZAKSTAN	10.0
MALAYSIA	100.0
MEXICO	750.0
MOROCCO	10.0
PHILIPPINES	100.0
POLAND	25.0
ROMANIA	45.0
SOUTHEAST ASIA REGION	90.0
SOUTHERN AFRICA REGION	50.0
SOUTHWEST EUROPE REGION	25.0
SRILANKA	70.0
THAILAND	300.0
TURKEY	350.0
WEST CARIBBEAN REGION	35.0
WEST AFRICA REGION	50.0

1/Coverage is detailed in FAS Program Announcements for all commodities, including those not listed as of October 16, 1998. FAS news releases are available on the Internet at <http://www.fas.usda.gov/excredits/exp-cred-guar.html>.

## FY 1999 SUPPLIER CREDIT COVERAGE 1/

Country	Announced Allocation (In Millions of Dollars)
ARGENTINA	1.0
BALTIC REGION	5.0
BRAZIL	10.0
CENTRAL AMERICA REGION	10.0
CENTRAL EUROPE REGION	20.0
EAST AFRICA REGION	5.0
EAST CARIBBEAN REGION	5.0
GEORGIA	5.0
JAMAICA	5.0
KAZAKSTAN	5.0
MEXICO	100.0
POLAND	10.0
SOUTH KOREA	50.0
SOUTHEAST ASIA REGION	50.0
SOUTHEAST EUROPE REGION	20.0

1/Coverage is detailed in FAS Program Announcements for all commodities, including those not listed as of October 16, 1998. FAS news releases are available on the Internet at <http://www.fas.usda.gov/excredits/scgp.html>.

## NORTHERN HEMISPHERE APPLE SITUATION

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Total apple production in selected Northern Hemisphere countries in 1998/99 is forecast at 41.5 million metric tons, up 4 percent from the previous year's output. Larger apple crops are expected in some major producing Northern Hemisphere countries, such as China and the United States. On the other hand, Northern Hemisphere apple exports in 1998/99 are forecast at 2.9 million tons, down 7 percent from the previous season's shipments. The economic problems facing Asia, Eastern Europe, and Russia, and the strong U.S. dollar vis-a-vis other country currencies will likely slowdown Northern Hemisphere apple trade in 1998/99, particularly exports from the United States and the European Union. U.S. apple exports in 1998/99 are forecast to decrease for the second consecutive year to 550,000 tons, the smallest volume since 1992/93.

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### NORTHERN HEMISPHERE

#### United States

##### *U.S. apple production in 1998/99 forecast at near record level*

U.S. apple **production** in marketing year 1998/99 (July-June) is forecast at 5.1 million metric tons, up 9 percent from last season's output and only 2 percent below the 1994/95 record crop. Increased production prospects in the western states, except California, will likely offset reduced prospects for eastern and central states apple harvests.

Apple production in western states in 1998/99 is forecast at 3.4 million tons, 19 percent above last year's output, based primarily on a larger Washington state apple crop. Apple production in Washington state, the largest U.S. apple producer, is forecast at a record 2.8 million tons, up 22 percent from last season and 4 percent above the 1994/95 record. Heavy blooming, following a smaller 1997/98 crop, and favorable weather conditions during pollination have boosted production prospects in Washington this season. However, unusual warm weather later in the summer have affected the quality of some early varieties.

Washington state alone accounts for more than 50 percent of the total U.S. apple crop in 1998/99. On the other hand, relatively cooler temperatures and above-normal rainfall have slowed production prospects in California, the third largest U.S. apple producing state. California's apple crop in 1998/99 is forecast at 415,000 tons, down 5 percent from the 1997/98 output.

Production of apples in 1998/99 in the central states is forecast at about 617,000 tons, 4 percent below the 1997/98 crop. Michigan, the major producing state in the central region, is forecast to produce about 454,000 tons, 5 percent less than in 1997/98. Apple production in 1998/99 in the eastern states is forecast at 1.1 million tons, 8 percent below a year ago. Output in New York, the second largest U.S. producing state, is forecast at 472,000 tons, down 7 percent from last season's record crop. Hail and wind damage during fruit setting have reduced New York's apple production prospects in 1998/99.

##### *U.S. apple exports to decrease again in 1998/99*

Over 50 percent of U.S. apple production is destined to the fresh domestic and export

markets. U.S. apple *exports* in 1998/99 are forecast to decrease for the second consecutive year to 550,000 tons, the lowest level since 1992/93. The economic problems facing countries in Asia, Eastern Europe, Russia, and Latin America and the associated disturbance in world currency values will likely again hamper U.S. apple exports in 1998/99. Furthermore, Mexico has shut down its inspection program in the U.S. Pacific Northwest, effectively closing that country's market to U.S. apples (*for more details on this issue, see "Mexico" section*). USDA and industry efforts to address and resolve this troubling development are ongoing. Washington state is the U.S. major apple exporting state, selling about a third of its crop to international markets. Mexico, Taiwan, Indonesia, and Canada represent some of Washington state's biggest customers. Moreover, Mexico normally accounts for about 15 percent of Washington state foreign sales.

#### ***Domestic apple consumption forecast strong in 1998/99***

U.S. apple consumption in 1998/99 is forecast to increase 11 percent to a record 2.5 million tons. A larger U.S. crop, expected weaker export demand, and the associated downward pressure on prices will likely boost apple domestic consumption this season. U.S. apple consumption in 1998/99 will be further encouraged by the Washington Apple Commission's (WAC) \$22.5 million domestic consumer advertising program to be launched this season. Most of WAC's advertising program will be paid with additional funds supported by a 15 cent increase in the assessment paid per box of apples produced in Washington state.

Following concerns over the large 1998/99 U.S. apple crop, the difficult export picture, and the aim of increasing domestic consumption, Washington state's apple growers voted to approve a 15 cent increase in the assessment paid per box of apples produced in the state. Accordingly, the assessment rate went from 25 cents to 40 cents per box. The 40-cent rate

will remain in effect for three years, after which growers will vote to either keep the 40-cent assessment or go back to the rate of 25 cents per box. The additional funds will help target more than 40 percent of the U.S. population and support consumer advertising 12 months a year, including television, radio, and billboards' ads.

U.S. apple consumption has plateaued to about 18 to 20 pounds per capita for the last few years. Some in the apple industry believe that the best way to boost U.S. consumption of apples is through direct consumer advertising.

#### ***Last season's apple shipments decreased sharply***

U.S. apple exports in 1997/98 totaled 569,285 tons, down 15 percent from shipments a year earlier. Apple exports last season were adversely impacted by the stronger U.S. dollar vis-a-vis other countries' currencies (particularly in Southeast Asian countries), a smaller Washington state apple crop, and the implementation of Mexico's 101 percent antidumping duty on U.S. Red and Golden delicious apples, which was imposed in September 1997 and subsequently lifted in March 1998.

The economic crisis and the strong U.S. dollar adversely affected all of the Asian export destinations, except Hong Kong, the U.S. 4<sup>th</sup> largest market. Exports to the largest U.S. market, Taiwan, were down 6 percent compared with last year's shipments. Other major apple markets in Asia were similarly affected, such as Indonesia (down 49 percent), Philippines (down 39 percent) Thailand (down 49 percent), and Malaysia (down 48 percent).

#### ***Settlement Reached on U.S./Mexico Apple Anti-dumping Dispute***

The currency devaluation crisis was not the only factor behind reduced U.S. apple shipments in 1997/98. As mentioned, further compounding last season's U.S. apple industry's export woes was Mexico's



September 1997 decision to impose an antidumping duty of 101.1 percent on imports of U.S. Golden and Red Delicious apples. After at least two previous unsuccessful attempts to reach a mutually acceptable marketing arrangement, Pacific Northwest apple industry representatives and officials from Mexico's Secretariat of Commerce and Industrial Development (SECOFI), successfully negotiated a suspension agreement, which ended the alleged dumping issue effective March 20, 1998.

Under the terms of the agreement, all U.S. shipments of Red and Golden Delicious apples to Mexico must comply with a minimum FOB price of \$13.72 per standard 42-pound box. For bagged or bulk apples, an equivalent FOB price of 32.67 cents per pound is in effect. The agreed-upon minimum prices were based on three-year average (crops years 1995/96, 1996/97, and 1997/98 through March) FOB prices of those varieties, as reported by the Washington Growers Clearing House Association. The current minimum price will remain in effect through October 31, 1999. The agreement is for five years (or through 2003) and calls for the minimum price to be adjusted every November 1, starting in 1999, to reflect the average of the preceding three crop years. A resolution accepting the price agreement proposed was announced in the Mexican Federal Register (Diario Oficial) on May 15, 1998.

#### ***WTO dispute settlement panel ruled in favor of the United States***

The World Trade Organization (WTO) dispute settlement panel issued a ruling on October 9, 1998 in the U.S./Japan varietal testing case in favor of the United States. The WTO report acknowledges that Japan's varietal testing requirements for imports of apples, cherries, walnuts, and nectarines have been an illegal trade barrier. Specifically, the Panel concluded that Japan's policy is inconsistent with its obligation under the Sanitary and Phytosanitary (SPS) Agreement and recommended that Japan bring its measure into conformity with its

obligations. The United States expects an appeal from Japan on the ruling.

Japan requires repeated testing of established quarantine treatments each time entry approval is requested for a different variety of an already approved fruit. This redundant testing requirement has no scientific basis and is costly to U.S. producers and traders.

#### **Mexico**

#### ***Reduced Mexican apple harvest expected in 1998/99***

Mexico's apple *production* in 1998/99 (August-July) is forecast at 428,000 tons, 10 percent below the previous year's crop. An off-season in the production cycle and frost problems during flowering, mainly in the State of Chihuahua, have hampered Mexican apple production prospects in 1998/99. Chihuahua is Mexico's largest apple producing region. Coahuila and Durango are also important producing regions.

Mexico's deciduous fruit industry continues to suffer from a lack of credit availability and high interest rates. Fluctuations on the peso exchange rate and relatively high inflation have also increased production costs, as prices for imported production inputs have become higher.

Mexican apple *imports* in 1998/99 are forecast to remain at about the 1997/98 level or 60,000 tons. A volatile peso exchange rate, expected lower economic growth, and as such, a reduction on Mexico's consumers purchasing power are expected to hamper apple imports in 1998/99 to this important U.S. outlet.

The United States normally supplies more than 90 percent of the Mexican apple import market. Red and Golden Delicious varieties comprise approximately 75-80 percent of total U.S. apple exports to Mexico. The adverse economic factors expected in Mexico this season, combined with the minimum price (\$13.72 per standard 42 pound box) agreed upon the



U.S./Mexico dumping suspension agreement, will likely make U.S. Red and Golden Delicious apple varieties more expensive to Mexican buyers.

#### ***Mexico terminates U.S. apple export program***

Mexico's apple imports from the United States will be further affected by developments occurring in October. Following a disagreement over the budget terms for the 1998/99 apple export program, Mexico has shut down its inspection program in the Pacific Northwest, effectively closing that country's market to U.S. apples. USDA and industry efforts to address and resolve this situation are ongoing.

Under the existing apple export program with Mexico, industry is required to negotiate annually with Mexican plant quarantine authorities on the terms of the oversight inspection program, which operates on an October-September year.

As recently as 5 years ago, apple shipments to Mexico approached \$90 million. However, following the peso devaluation in late 1994 and last year's imposition of a 101.1 percent antidumping duty, which subsequently led the industry to enter into a minimum import price agreement, apple shipments to Mexico have declined significantly, totaling \$35 million in marketing year 1997/98.

#### **European Union**

##### ***Apple production to increase slightly in countries of the EU***

Apple *production* in the European Union in 1998/99 is forecast at 8.6 million tons, 4 percent above last season's output. Larger crops in **Italy** and **Germany**, will more than offset an expected lower apple harvest in **France** in 1998/99. **France, Italy, and Germany** are the EU's major apple producing countries, accounting for about 65 percent of the EU total apple crop.

French apple production in 1998/99 is forecast to decrease to 1.8 million tons. The decrease

is mainly due to a frost in April that affected the southern part of France, the main fruit producing region. The major apple varieties grown in France are Golden Delicious, Granny Smith, and Red American varieties. Gala is becoming a major variety.

Italian apple production in 1998/99 is forecast to increase 3 percent to 2.1 million tons. However, fruit quality is expected lower, due to some hail storms during the spring season. Golden Delicious varieties account for the bulk of Italy's apple output.

Germany's 1998/99 apple production is forecast at 2.0 million tons, up sharply (35 percent) from last season. A mild winter, which promoted good fruit settings and early growth, combined with less hail damage in spring boosted production prospects in 1998/99 considerably.

#### ***EU apple exports to decrease in 1998/99***

EU apple *exports* in 1998/99 are forecast at 1.9 million tons, down 7 percent from 1997/98. **French** apple exports in 1998/99 are forecast at 790,000 tons, 10 percent below 1997/98 shipments. The financial turmoil in Russia and the economic recession in southeast Asia will likely cut French apple exports in 1998/99. French apple exports in 1998/99 may also be hurt by increased competition in EU markets from Italy and the Netherlands, who will likely face the same problems in the Russian and Asian markets. France is the largest EU exporter, shipping mostly to the United Kingdom and Germany. However, France has also been successful in recently penetrating other markets such as Scandinavia, Eastern Europe, and Russia, the result of continuous efforts on quality and marketing. French apples, mainly Gala and bi-colored varieties, are increasingly being consumed in some Asian countries, such as Japan and Taiwan.

Italy's apple exports in 1998/99 are forecast to remain at the 1997/98 shipment level or 390,000 tons. Italy's major apple buyers are Germany, Austria, and Norway. On the other

hand, United Kingdom apple imports are expected to decrease almost 10 percent in 1998/99, due to increased domestic production. The main varieties of imported apples are Granny Smith, Golden Delicious, Red Delicious, Cox, Jonagold, Elstar, Fuji, Braeburn, Gala, and Empire. France continues to be the dominant apple supplier to the United Kingdom, accounting for about 45 percent of U.K. imports. South Africa is the dominant third-country supplier accounting for about 20 percent. The United States, which ranks 4<sup>th</sup> after New Zealand, accounts for about 7 percent of total U.K. apple imports. The main U.S. apple varieties imported are Red Delicious, Empire and McIntosh.

#### **Taiwan**

##### ***Apples continue to be the number one imported fruit in Taiwan***

Taiwanese apple *imports* in 1998/99 are forecast to decrease 5 percent to 133,000 tons. The prevailing unfavorable economic situation will likely slow down Taiwanese apple imports in 1998/99. Until Taiwan joins the World Trade Organization (WTO), restrictions will remain for apple imports. All countries are subject to Taiwan import quotas except for the United States and Canada. In 1998, Argentina was listed as a new apple supplier and received an annual quota of 2,000 tons. South Korea's 9,500 tons apple import quota was rescinded due to a trade dispute.

Fuji apples are the most preferred variety in Taiwan, accounting for about 85 percent of total apple imports. The United States, accounting for 80 percent market share, is by far the major supplier of apples to Taiwan. Total U.S. apple exports to Taiwan in 1997/98, however, decreased 6 percent to 112,708 tons. The continued devaluation of the New Taiwan Dollar vis-a-vis the U.S. dollar negatively affected U.S. apple exports to Taiwan last season. Normally, Washington apples account for about 65 percent of U.S. apple shipments to Taiwan. Under the current import system, U.S. apples face only limited competition, mainly from Chile. However,

Chile's market share has increased from 5 percent in 1996/97 to 10 percent in 1997/98.

Washington Fuji enjoys a leading position among all varieties in terms of sales volume. In December 1997, traders discovered smuggled Fuji apples on the market that were suspected to be of Mainland China origin, but were marked with the Washington apple logo. The incident raised many concerns among traders, and led to interventions by the U.S. government. The investigation later showed the incident to be an isolated case and the perpetrator received both legal and economic penalties from Taiwan Customs.

As the result of WTO accession negotiations, Taiwan's tariff for all imported apples was reduced from 50 percent to 40 percent, effective in July 1998. Cost/insurance/freight (CIF) reference price mechanism, controlled by the Taiwan Customs Department, remains in place.

Despite the unfavorable economic situation, apple consumption in Taiwan has been stable. Total consumption last season (1997/98) increased 4 percent. Per capita consumption remains at the 14 pound level. A recent market research conducted by the Washington Apple Commission shows that Taiwan consumers view apples as a healthy, good tasting, and an easy to eat food item. Therefore, the level of apple consumption is expected to remain stable this season despite the Asian economic crisis.

#### **China**

##### ***China's apple production to continue to increase in 1998/99***

China's apple production is forecast to increase 8 percent in 1998/99 to 18.6 million tons, mainly due to good weather conditions. This year's summer floods in China are expected to have little to no impact on apple production, because nearly all of the flooding occurred outside of the major growing regions. The vast majority of China's fresh deciduous fruit is grown by individual growers on small parcels of

land. The average amount of land each grower devotes to growing fruit is approximately one-fifth of a hectare. In Shanxi province, for example, the number of apple growers is estimated to be approximately 10,000. Few of these individual growers specialize in fruit and they often grow grain or other agricultural products on their land. They sometimes grow more than one variety of deciduous fruit, for example either apples and pears, or apples and grapes. Large commercial orchards are rare. Fuji presently is the main apple variety grown in China and its dominant position most likely will not change in the near future. Reportedly, Fuji accounted for more than 40 percent of the country's total apple production in 1997/98. In both of China's two major apple producing provinces, Shandong and Shaanxi, Fuji usually amounts to over half of their respective apple harvests. The average in Shandong is 70 percent and in Shaanxi 60 percent. Altogether, approximately 15 different varieties of apples are grown in China. Aside from Fuji, the other widely grown apple varieties include Red Delicious, Golden Delicious, Qinguan, and Guoguan. China's apple harvest period usually begins in late August and lasts until November.

***Poor post-harvest handling procedures and the lack of adequate infrastructure limit Chinese apple shipments***

China's apple exports in 1998/99 are forecast at 174,000 metric tons, down 3 percent from 1997/98. China's apple exports are hampered by poor post-harvest handling procedures and the lack of adequate infrastructure. After harvesting, most of the fruit is stored on the farm, either underground or under straw. This storage method limits the marketing season to three or four months and the quality of fruit drops sharply at season's end. Compounding the problem is the limited and poor transportation infrastructure in China's rural areas where nearly all of the apples are grown. Limited or non-existent cold storage transportation facilities have caused shipment losses and quality degradation.

Overseas investments are occurring in China's apple industry, although at a slow pace. Most

foreign investment is directed to the juice processing sector. The amount of apples for processing is forecast to increase again in 1998/99 to 1.1 million tons. Processed apples mainly become juice.

**SOUTHERN HEMISPHERE**

It is too early to make a reliable forecast for the Southern Hemisphere countries for the 1998/99 season (harvest in 1999). Forecasts will be available in the March 1999 issue of World Horticultural Trade & U.S. Export Opportunities.

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**TABLE 1**  
**APPLES: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES**  
**(METRIC TONS)**

Country Mktg. Year 1/	Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawal
<b>NORTHERN HEMISPHERE COUNTRIES</b>							
<b>EUROPEAN UNION (EU)</b>							
<b>Austria</b>							
1995/96	324,200	50,800	375,000	75,000	275,000	25,000	0
1996/97	366,400	164,000	530,400	34,200	188,000	220,000	88,200
1997/98	454,400	125,000	579,400	55,000	190,000	240,000	94,400
1998/99 F	392,000	140,000	532,000	40,000	186,000	216,000	90,000
<b>Belgium-Luxembourg</b>							
1995/96	513,935	187,908	701,843	245,442	281,171	175,000	230
1996/97	298,588	230,365	528,953	188,216	235,495	100,000	5,242
1997/98	373,155	200,000	573,155	210,000	240,083	120,000	3,072
1998/99 F	413,265	160,000	573,265	210,000	240,265	120,000	3,000
<b>Denmark</b>							
1995/96	65,000	38,057	103,057	1,756	86,301	15,000	0
1996/97	65,000	40,402	105,402	2,193	93,209	10,000	0
1997/98	71,000	46,618	117,618	2,808	104,810	10,000	0
1998/99 F	67,000	45,000	112,000	2,000	100,000	10,000	0
<b>France</b>							
1995/96	2,088,500	53,000	2,141,500	860,000	912,500	275,000	94,000
1996/97	2,047,400	74,100	2,121,500	758,800	977,700	275,000	110,000
1997/98	2,027,000	90,000	2,117,000	880,000	902,000	275,000	60,000
1998/99 F	1,840,000	100,000	1,940,000	790,000	825,000	275,000	50,000
<b>Germany</b>							
1995/96	1,372,600	965,184	2,337,784	42,511	1,544,973	750,000	300
1996/97	1,878,100	737,906	2,616,006	48,475	1,723,617	840,000	3,914
1997/98	1,465,000	881,063	2,346,063	60,000	1,454,217	830,000	1,846
1998/99 F	1,978,000	750,000	2,728,000	50,000	1,823,000	850,000	5,000
<b>Greece</b>							
1995/96	300,581	12,748	313,329	20,931	212,398	2,000	78,000
1996/97	352,000	7,193	359,193	24,299	195,594	1,500	137,800
1997/98	292,400	10,000	302,400	15,000	228,900	6,500	52,000
1998/99 F	310,000	7,000	317,000	20,000	235,500	1,500	60,000
<b>Italy</b>							
1995/96	1,889,000	51,000	1,940,000	474,100	1,075,900	390,000	0
1996/97	2,025,000	13,000	2,038,000	327,800	1,255,138	450,000	5,062
1997/98	2,014,000	23,000	2,037,000	387,000	1,250,000	400,000	0
1998/99 F	2,065,000	15,000	2,080,000	390,000	1,290,000	400,000	0
<b>Netherlands</b>							
1995/96	595,000	370,063	965,063	501,578	381,293	81,800	392
1996/97	490,000	274,078	764,078	305,501	374,414	78,100	6,063
1997/98	470,000	300,000	770,000	319,731	350,000	97,500	2,769
1998/99 F	520,000	240,000	760,000	300,000	355,000	100,000	5,000
<b>Spain</b>							
1995/96	842,900	147,300	990,200	47,800	692,000	180,400	70,000
1996/97	893,600	103,200	996,800	64,500	670,000	150,000	112,300
1997/98	880,000	105,000	985,000	45,000	680,000	160,000	100,000
1998/99 F	742,500	112,500	855,000	35,000	680,000	130,000	10,000
<b>Sweden</b>							
1995/96	67,516	84,306	151,822	1,385	145,437	5,000	0
1996/97	62,053	83,299	145,352	1,689	138,663	5,000	0
1997/98	72,168	91,427	163,595	1,549	157,046	5,000	0
1998/99 F	65,000	92,000	157,000	1,500	150,500	5,000	0
<b>United Kingdom</b>							
1995/96	198,721	427,220	625,941	33,439	569,826	21,859	817
1996/97	223,800	407,776	631,576	28,440	570,800	31,736	600
1997/98	137,000	438,944	575,944	19,207	541,000	15,000	737
1998/99 F	215,000	400,000	615,000	20,000	570,000	24,800	200

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**(METRIC TONS)**

Country Mktg. Year 1/	Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawal
<b>SUBTOTAL EU</b>							
1995/96	8,257,953	2,387,586	10,645,539	2,303,942	6,176,799	1,921,059	243,739
1996/97	8,701,941	2,135,319	10,837,260	1,784,113	6,422,630	2,161,336	469,181
1997/98	8,256,123	2,311,052	10,567,175	1,995,295	6,098,056	2,159,000	314,824
1998/99 F	8,607,765	2,061,500	10,669,265	1,858,500	6,455,265	2,132,300	223,200
<b>OTHER NORTHERN HEMISPHERE COUNTRIES</b>							
<b>Bulgaria</b>							
1995/96	90,000	13,128	103,128	424	50,000	42,704	10,000
1996/97	180,000	10,193	190,193	2,201	75,992	92,000	20,000
1997/98	160,000	11,991	171,991	92	79,899	74,000	18,000
1998/99 F	150,000	13,000	163,000	100	81,000	66,900	15,000
<b>Canada</b>							
1995/96	608,217	100,739	708,956	99,232	370,724	239,000	0
1996/97	512,993	107,340	620,333	105,338	357,995	157,000	0
1997/98	503,039	122,551	625,590	74,606	350,984	200,000	0
1998/99 F	510,000	120,000	630,000	85,000	360,000	185,000	0
<b>China, Peoples Republic of</b>							
1995/96	14,007,662	9,540	14,017,202	149,324	13,167,495	700,383	0
1996/97	17,052,246	8,787	17,061,033	161,614	16,046,367	853,052	0
1997/98	17,200,000	16,500	17,216,500	180,000	16,175,675	860,825	0
1998/99 F	18,590,000	27,000	18,617,000	174,000	17,325,980	1,117,020	0
<b>Hungary</b>							
1995/96	353,000	45,000	398,000	34,000	131,000	233,000	0
1996/97	551,900	31,100	583,000	57,100	165,000	360,900	0
1997/98	560,000	48,000	608,000	26,000	165,000	417,000	0
1998/99 F	440,000	50,000	490,000	30,000	145,000	315,000	0
<b>Japan</b>							
1995/96	963,300	1,089	964,389	2,506	798,883	163,000	0
1996/97	899,200	338	899,538	3,625	760,913	135,000	0
1997/98	993,100	131	993,231	3,663	817,568	172,000	0
1998/99 F	964,100	150	964,250	4,000	794,250	166,000	0
<b>Mexico</b>							
1995/96	413,230	81,200	494,430	0	424,430	70,000	0
1996/97	426,720	109,000	535,720	0	455,720	80,000	0
1997/98	475,000	58,000	533,000	0	463,000	70,000	0
1998/99 F	428,000	60,000	488,000	0	443,000	45,000	0
<b>Norway</b>							
1995/96	52,559	39,344	91,903	0	67,646	3,042	21,215
1996/97	43,161	40,064	83,225	0	65,020	1,964	16,241
1997/98	44,640	35,359	79,999	0	61,646	1,456	16,897
1998/99 F	47,656	36,000	83,656	0	62,771	2,291	18,594
<b>Poland</b>							
1995/96	1,288,000	27,400	1,315,400	74,000	341,400	900,000	0
1996/97	1,951,500	26,419	1,977,919	95,919	682,000	1,200,000	0
1997/98	2,098,000	26,560	2,124,560	191,520	583,040	1,350,000	0
1998/99 F	1,950,000	27,000	1,977,000	150,000	557,000	1,270,000	0
<b>Romania</b>							
1995/96	500,000	7,900	507,900	40,000	372,900	85,000	10,000
1996/97	510,000	5,000	515,000	35,000	350,000	117,000	13,000
1997/98	572,000	4,000	576,000	37,000	320,000	207,000	12,000
1998/99 F	485,000	4,000	489,000	15,000	260,000	200,000	14,000
<b>Russian Federation</b>							
1995/96	1,094,000	407,350	1,501,350	310	710,000	480,500	310,540
1996/97	1,755,000	406,400	2,161,400	650	845,750	865,000	450,000
1997/98	1,409,000	508,000	1,917,000	950	775,000	865,000	276,050
1998/99 F	1,440,000	373,000	1,813,000	400	779,600	863,000	170,000

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**APPLES: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES**  
**(METRIC TONS)**

Country Mktg. Year 1/	Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawal
<b>Serbia/Montenegro</b>							
1995/96	141,000	12,000	153,000	1,000	93,000	59,000	0
1996/97	240,000	0	240,000	1,200	158,800	80,000	0
1997/98	205,000	1,000	206,000	500	120,500	85,000	0
1998/99 F	200,000	0	200,000	0	130,000	70,000	0
<b>Slovakia</b>							
1995/96	38,100	800	38,900	400	32,500	6,000	0
1996/97	79,100	27,000	106,100	12,300	68,800	25,000	0
1997/98	80,300	20,000	100,300	9,200	69,000	22,100	0
1998/99 F	87,000	12,000	99,000	11,000	70,000	18,000	0
<b>Taiwan</b>							
1995/96	9,482	110,433	119,915	0	119,915	0	0
1996/97	8,251	131,750	140,001	0	140,001	0	0
1997/98	9,180	136,600	145,780	0	145,780	0	0
1998/99 F	8,320	130,000	138,320	0	138,320	0	0
<b>Turkey</b>							
1995/96	2,100,000	1,336	2,101,336	47,226	1,949,110	105,000	0
1996/97	2,200,000	1,662	2,201,662	53,499	2,038,163	110,000	0
1997/98	2,550,000	2,000	2,552,000	50,000	2,377,000	125,000	0
1998/99 F	2,500,000	2,000	2,502,000	50,000	2,327,000	125,000	0
<b>United States 2/</b>							
1995/96	4,801,281	168,729	4,970,010	562,555	2,345,059	2,062,396	0
1996/97	4,713,738	166,096	4,879,834	666,857	2,341,906	1,871,071	0
1997/98	4,711,061	167,214	4,878,275	569,285	2,269,183	2,039,807	0
1998/99 F	5,135,579	125,000	5,260,579	550,000	2,510,579	2,200,000	0
<b>SUBTOTAL OTHER NORTHERN HEMISPHERE COUNTRIES</b>							
1995/96	26,459,831	1,025,988	27,485,819	1,010,977	20,974,062	5,149,025	351,755
1996/97	31,123,809	1,071,149	32,194,958	1,195,303	24,552,427	5,947,987	499,241
1997/98	31,570,320	1,157,906	32,728,226	1,142,816	24,773,275	6,489,188	322,947
1998/99 F	32,935,655	979,150	33,914,805	1,069,500	25,984,500	6,643,211	217,594
<b>TOTAL NORTHERN HEMISPHERE COUNTRIES</b>							
1995/96	34,717,784	3,413,574	38,131,358	3,314,919	27,150,861	7,070,084	595,494
1996/97	39,825,750	3,206,468	43,032,218	2,979,416	30,975,057	8,109,323	968,422
1997/98	39,826,443	3,468,958	43,295,401	3,138,111	30,871,331	8,648,188	637,771
1998/99 F	41,543,420	3,040,650	44,584,070	2,928,000	32,439,765	8,775,511	440,794
<b>SOUTHERN HEMISPHERE COUNTRIES</b>							
<b>Argentina</b>							
1995/96	1,253,480	8,551	1,262,031	207,867	431,002	623,162	0
1996/97	1,299,466	9,615	1,309,081	209,534	476,133	623,414	0
1997/98	1,416,822	5,033	1,421,855	229,654	430,354	761,847	0
1998/99 F	NA	NA	NA	NA	NA	NA	NA
<b>Australia</b>							
1995/96	280,220	0	280,220	21,007	152,220	106,993	0
1996/97	353,068	0	353,068	33,834	170,000	149,234	0
1997/98	280,596	0	280,596	32,000	148,596	100,000	0
1998/99 F	NA	NA	NA	NA	NA	NA	NA
<b>Brazil</b>							
1995/96	527,400	355,000	882,400	12,000	750,400	120,000	0
1996/97	630,000	350,000	980,000	25,000	892,000	63,000	0
1997/98	670,000	360,000	1,030,000	45,000	920,000	65,000	0
1998/99 F	NA	NA	NA	NA	NA	NA	NA

continued--



**TABLE 1**  
**APPLES: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES**  
**(METRIC TONS)**

Country Mktg. Year 1/	Production	Imports	Supply Utilization	Exports	Domestic Consumption	Processed	Withdrawal
<b>Chile</b>							
1995/96	910,000	0	910,000	442,000	92,000	376,000	0
1996/97	920,000	72	920,072	386,587	93,000	440,485	0
1997/98	970,000	240	970,240	445,000	93,500	431,740	0
1998/99 F	NA	NA	NA	NA	NA	NA	NA
<b>New Zealand</b>							
1995/96	546,000	110	546,110	310,170	53,000	182,940	0
1996/97	568,552	167	568,719	286,500	53,000	229,219	0
1997/98	498,190	100	498,290	235,000	53,000	210,290	0
1998/99 F	NA	NA	NA	NA	NA	NA	NA
<b>South Africa, Republic of</b>							
1995/96	702,500	0	702,500	208,750	246,250	247,500	0
1996/97	639,026	0	639,026	170,416	252,440	216,170	0
1997/98	660,000	0	660,000	180,000	260,000	220,000	0
1998/99 F	NA	NA	NA	NA	NA	NA	NA
<b>TOTAL SOUTHERN HEMISPHERE COUNTRIES</b>							
1995/96	4,219,600	363,661	4,583,261	1,201,794	1,724,872	1,656,595	0
1996/97	4,410,112	359,854	4,769,966	1,111,871	1,936,573	1,721,522	0
1997/98	4,495,608	365,373	4,860,981	1,166,654	1,905,450	1,788,877	0
1998/99 F	NA	NA	NA	NA	NA	NA	NA
<b>WORLD TOTAL</b>							
1995/96	38,937,384	3,777,235	42,714,619	4,516,713	28,875,733	8,726,679	595,494
1996/97	44,235,862	3,566,322	47,802,184	4,091,287	32,911,630	9,830,845	968,422
1997/98	44,322,051	3,834,331	48,156,382	4,304,765	32,776,781	10,437,065	637,771
1998/99 F	NA	NA	NA	NA	NA	NA	NA

1/ Data for Northern Hemisphere countries are for a July/June marketing year, except for Mexico and France which are August/July. In the Southern Hemisphere the marketing year begins on January 1 of the second year indicated, except for Chile where the year starts on February 1 of the second year indicated, and New Zealand where the year starts in October 1 of the first year indicated. For Austria, processing apples are not included in production.

2/ U.S. import/export estimates based on U.S. Census of the Bureau data, through August 1998, and trade contacts.

F= Forecast

**TABLE 2**  
**U.S. APPLE EXPORTS**  
**MARKETING YEARS 1995/96-1997/98**  
**(JULY-JUNE)**  
**METRIC TONS**

	1997/98 Rank	1995/1996	1996/1997	1997/1998	% CHANGE 1996/97-1997/98
Taiwan	1	101,650	119,711	112,708	-5.85
Canada	2	78,790	90,464	96,311	6.46
Mexico	3	80,802	89,659	63,028	-29.70
Hong Kong	4	49,741	45,932	47,488	3.39
Indonesia	5	49,455	61,667	31,368	-49.13
Saudi Arabia	6	13,014	19,483	22,521	15.60
United Arab Emirates	7	7,676	17,411	21,811	25.27
United Kingdom	8	22,740	23,152	21,019	-9.21
Venezuela	9	4,435	7,330	17,270	135.61
Philippines	10	16,258	25,765	15,840	-38.52
Thailand	11	27,217	27,686	14,137	-48.94
Malaysia	12	16,634	25,739	13,483	-47.62
Russian Federation	13	8,714	9,848	11,234	14.07
Colombia	14	7,142	7,982	8,073	1.14
Guatemala	15	5,402	6,665	7,228	8.44
Costa Rica	16	5,741	5,702	6,931	21.56
Singapore	17	10,602	12,320	6,497	-47.26
Dominican Republic	18	3,771	5,010	4,679	-6.61
Egypt	19	1,969	1,654	4,630	179.93
Brazil	20	13,207	16,009	4,315	-73.05
Panama	21	2,116	3,232	3,549	9.83
Ecuador	22	2,034	2,213	3,464	56.52
Kuwait	23	2,777	3,440	2,988	-13.13
Finland	24	4,523	4,409	2,866	-34.99
Sweden	25	3,943	5,057	2,155	-57.38
Honduras	26	1,343	1,504	1,809	20.27
Iceland	27	1,589	1,635	1,769	8.18
Sri Lanka	28	858	1,024	1,586	54.83
Israel	29	1,459	6,096	1,465	-75.96
El Salvador	30	561	328	1,462	346.30
Bangladesh	31	470	1,480	1,136	-23.27
Peru	32	200	553	1,128	104.16
Trinidad and Tobago	33	817	929	1,085	16.75
Haiti	34	601	522	1,076	106.05
Bahrain	35	0	493	967	96.27
Ireland	36	1,554	1,454	964	-33.65
Vietnam	37	2,324	1,734	956	-44.88
Norway	38	514	924	779	-15.69
Netherlands	39	832	769	641	-16.60
Cambodia	40	223	818	567	-30.68
Nicaragua	41	163	503	552	9.79
Japan	42	1,403	877	514	-41.42
Barbados	43	248	147	450	205.12
Guyana	44	244	531	417	-21.50
Greece	45	801	233	400	71.35
French West Indies	46	926	214	382	78.73
Bahamas, The	47	44	43	376	781.92
Netherlands Antilles	48	236	267	298	11.52
Surinam	49	0	28	265	837.37

continued--

**TABLE 2**  
**U.S. APPLE EXPORTS**  
**MARKETING YEARS 1995/96-1997/98**  
**(JULY-JUNE)**  
**METRIC TONS**

	1997/98 Rank	1995/1996	1996/1997	1997/1998	% CHANGE 1996/97-1997/98
China, Peoples Repub.....	50	1,377	166	262	58.46
Australia .....	51	82	18	249	1301.67
French Pacific Islands.....	52	438	467	233	-50.08
Chile .....	53	64	0	196	N/A
Sierra Leone .....	54	0	0	189	N/A
Leeward-Windward Islands.....	55	59	33	151	361.89
Korea, Republic of .....	56	16	37	145	288.31
Other Pacific Island.....	57	124	0	137	N/A
Jamaica .....	58	444	119	106	-11.21
New Zealand .....	59	125	120	96	-20.21
Algeria .....	60	0	0	85	N/A
French Guiana .....	61	63	61	83	36.99
Cayman Islands .....	62	39	53	81	52.08
South Africa .....	63	0	0	78	N/A
Uruguay .....	64	337	18	75	306.63
Belize .....	65	43	94	73	-21.84
Brunei .....	66	0	20	59	201.42
Bermuda .....	67	46	88	54	-37.77
Denmark .....	68	0	0	41	N/A
Oman .....	69	0	0	40	N/A
Qatar .....	70	0	0	38	N/A
Pakistan .....	71	0	345	33	-90.40
France .....	72	0	19	33	73.23
Romania .....	73	0	0	31	N/A
Ukraine .....	74	0	0	23	N/A
India .....	75	35	523	21	-95.99
Argentina .....	76	211	3,458	19	-99.46
Belgium-Luxembourg .....	77	418	296	18	-94.02
Germany .....	78	149	39	0	-100.00
Jordan .....	79	60	0	0	N/A
Kenya .....	80	0	62	0	-100.00
Malta & Gozo .....	81	70	57	0	-100.00
Mauritius .....	82	17	0	0	N/A
Portugal .....	83	37	0	0	N/A
Spain .....	84	482	119	0	-100.00
Grand Total		562,555	666,857	569,285	-14.63

Source: U.S. Department of Commerce, Bureau of the Census

## TABLE GRAPE SITUATION AND OUTLOOK

Table grape exports from selected Northern Hemisphere countries in 1998 are forecast at 1.15 million metric tons, 3 percent above 1997 shipments. Higher exports from most countries, especially Italy, will likely offset lower exports from the United States and Spain. Unfavorable growing conditions including El Nino have affected quality levels and reduced the table grape production forecast for the United States to 680,000 tons. U.S. exports are forecast to decrease 20 percent to 215,000 tons in 1998, based on an expected smaller harvest and lower than expected exports to date. U.S. table grape exports have also been unfavorably impacted by the economic situation in some Asian countries.

### Northern Hemisphere Outlook

#### United States

California's table grape production in 1998 is forecast at 680,000 tons, 9 percent below last season's record crop. California accounts for over 90 percent of total U.S. table grape production.

U.S. table grape exports in 1998 are forecast to decrease 20 percent to 215,000 tons, based on the lower production and decreased exports to Asian markets. Currency devaluations in Southeast Asia and a stronger U.S. dollar, will likely continue to affect U.S. export prospects in that region.

Direct exports of California grapes to China were previously prohibited because of phytosanitary concerns, such as Mediterranean fruit fly. Beginning with last year's crop, California grape producers in Fresno, Kern, Tulare, and Madera counties shipped grapes to China for the first time. Thus far in 1998 (January to August), direct table grape sales to China are valued at \$500,000.

The United States is a net table grape importer. Imports in 1998 are forecast to increase by 16 percent to 400,000 tons based on the smaller U.S. harvest and increasing consumer demand for fresh fruit.

#### France

In 1998, French production of table grapes is forecast to increase 6 percent to 107,000 tons, despite late frosts in April. Frosts damaged table grape vineyards in Southern France.

In general, France imports more table grapes than it produces, with 75 percent coming from Italy and most of the rest from Spain. French table grape imports in 1998 are forecast at 120,000 tons, the same as the previous year's level. Exports are forecast at 12,000 tons in 1998, 20 percent higher than in 1997.

French consumption of table grapes in 1998 is expected to remain near the previous year's level. At least 65 percent of grapes consumed in France are white varieties and are dominated by the Italia variety as 40 percent of consumption. It is considered a good variety for snacking and fast lunches which is a new consumer trend. The primary black variety is the Muscat, which accounts for 20 percent of consumption. Table grape consumers in France in general have been found to be older and have higher than average incomes.

#### Greece

Favorable weather conditions have prevailed thus far in 1998 and crop quality is good. Table grape production in 1998 is forecast at

304,000 tons, slightly below the revised previous year's harvest.

Greece is a net exporter of table grapes. Fresh table grape exports in 1998 are forecast at 105,000 tons, up 2 percent. Greece's largest markets include Germany, the United Kingdom and Holland.

### **Japan**

Table grape production in 1998 is forecast at 246,700 tons, down 2 percent from the preceding year. Table grape acreage declined by 3 percent due to aging farm populations who retire from their orchards and other farmers who switched to other fruits. The region experienced relatively good weather from the blossoming season to the harvesting season. The Pione and Kyoho varieties increased in production area in 1998 while most other varieties declined.

Japan's grape imports in 1998 are forecast at 6,800 tons, down approximately 8 percent from the previous year due to the weaker Japanese economy. The United States and Chile are the two major suppliers, accounting for over 99 percent of imports. The Chilean table grape season is February through May and Japan's imports this year were 22 percent below last year's level. In December, 1997, the Government of Japan re-opened the market for Taiwanese table grapes after a 4 year suspension due to pest problems. Reportedly, Japanese importers do not expect to increase imports due to economic reasons. Most grape imports from the United States occur October through January. Large, high quality, and sweet grapes are preferred by Japanese consumers.

The import duty on fresh table grapes is 18 percent from March 1 to October 31 and 9.5 percent during November 1 to the end of February (HS code: 0806.10-000).

### **Italy**

Production in 1998 is forecast at 1.55 million tons, the same level as last year. Fruit quality

is expected to be good. Sicily and Apulia regions in the South of Italy account for about 70 percent of Italian table grape output. Italy is the largest producer of table grapes and accounts for approximately 21 percent of global output.

Italian exports are forecast at 600,000 tons in 1998, 9 percent above the previous year's level. Germany and France are the largest export markets.

### **Mexico**

Table grape production in 1998 is forecast at 117,000 tons, 6 percent above the 1997 level due to improved yields as a result of favorable weather conditions. The planted area is expected to increase slightly, especially in Sonora.

Table grape imports in 1998 are forecast to fall 14 percent to 32,000 tons, due to the increased larger supply and decreasing consumer purchasing power.

Mexican table grape exports in 1998 are forecast up 15 percent to 91,000 tons. Although the United States continues to be the main export market, Mexican exporters are seeking new markets in Europe and other countries.

### **Spain**

Spain's 1998 table grape production is forecast at 350,000 tons, up 13 percent, despite freezing conditions early in the season. The majority of the crop is planted in the Valencia region.

Spain is a net table grape exporter. Exports in 1998 are forecast at 95,000 tons, slightly below the previous year's shipments. Major traditional markets for Spanish grapes are other EU countries, mainly France, Germany, and the United Kingdom.

## Revised Southern Hemisphere

Data for the Southern Hemisphere have been revised since the March issue of the World Horticultural Trade & U.S. Export Opportunities. The forecast for Chilean grape production in 1998 has been revised upwards 4 percent to 850,000 tons. Overall favorable weather and adequate water supplies contributed to the increase. However, rains in the spring reduced crop quality. Exports are also forecast to increase 4 percent to 490,000 tons due to the expected larger harvest.

*(For further information on supply, distribution and trade, contact Stephanie Riddick at 202-720-9792. For information on marketing opportunities contact Yvette Wedderburn Bomersheim 202-720-0911)*



**Table Grapes: Production, Supply, and Distribution in Selected Countries**

Country/Year 1/	Total Production	Total Imports	Total Supply	Exports, Fresh Only	Domestic Fresh Consump	For Processing	Withdrawal From Market
Metric tons, net weight							
<b>Northern Hemisphere Countries</b>							
<b>France</b>							
1996	126,000	130,900	256,900	14,800	242,100	0	0
1997	100,700	120,000	220,700	10,000	210,700	0	0
1998	107,000	120,000	227,000	12,000	215,000	0	0
<b>Greece</b>							
1996	322,124	1,071	323,195	102,171	153,846	62,538	4,640
1997	307,882	608	308,490	102,577	135,913	65,000	5,000
1998	304,000	1,000	305,000	105,000	141,000	70,000	5,000
<b>Italy</b>							
1996	1,580,000	11,000	1,591,000	533,500	757,500	300,000	0
1997	1,550,000	11,000	1,561,000	530,000	731,000	300,000	0
1998	1,550,000	7,000	1,557,000	600,000	657,000	300,000	0
<b>Spain</b>							
1996	427,000	8,100	435,100	96,800	296,600	41,700	0
1997	310,800	19,700	330,500	100,000	215,500	15,000	0
1998	350,000	10,000	360,000	95,000	240,000	25,000	0
<b>Japan</b>							
1996	244,400	6,750	251,150	6	227,244	23,900	0
1997	250,900	7,350	258,250	11	233,739	24,500	0
1998	246,700	6,800	253,500	10	228,490	25,000	0
<b>Mexico</b>							
1996	103,620	21,700	125,320	60,400	64,920	0	0
1997	110,000	37,000	147,000	79,000	68,000	0	0
1998	117,000	32,000	149,000	91,000	58,000	0	0
<b>Turkey</b>							
1996	3,700,000	752	3,700,752	28,410	1,822,342	1,850,000	0
1997	3,700,000	936	3,700,936	33,403	1,817,533	1,850,000	0
1998	3,700,000	1,000	3,700,000	35,000	1,816,000	1,850,000	0
<b>United States 2/</b>							
1996	537,054	359,826	896,880	215,009	566,658	115,213	0
1997	748,428	345,000	1,093,428	268,846	615,930	208,652	0
1998 F	680,000	400,000	1,080,000	215,000	665,000	200,000	0
<b>Subtotal Northern Hemisphere</b>							
1996	7,040,198	540,099	7,580,297	1,051,096	4,131,210	2,393,351	4,640
1997	7,078,710	541,594	7,620,304	1,123,837	4,028,315	2,463,152	5,000
1998	7,054,700	577,800	7,631,500	1,153,010	4,020,490	2,470,000	5,000

Continued -

**Table Grapes: Production, Supply, and Distribution in Selected Countries**

Country/Year 1/	Total Production	Total Imports	Total Supply	Exports, Fresh Only	Domestic Fresh Consump	For Processing	Withdrawal From Market
Metric tons, net weight							
<b>Southern Hemisphere Countries</b>							
<b>Argentina</b>							
1996	96,800	3,006	99,806	12,250	73,556	14,000	0
1997	120,000	2,500	122,500	14,000	90,500	18,000	0
1998	110,000	2,500	112,500	14,000	82,500	16,000	0
<b>Chile</b>							
1996	865,000	0	865,000	513,000	91,500	260,500	0
1997	815,000	170	815,170	450,000	91,900	273,270	0
1998	850,000	200	850,200	490,000	92,000	268,200	0
<b>South Africa, Republic of</b>							
1996	156,000	0	156,000	102,000	51,000	3,000	0
1997	156,000	0	156,000	100,000	53,000	3,000	0
1998	165,000	0	165,000	105,000	56,000	4,000	0
<b>Subtotal Southern Hemisphere</b>							
1996	1,117,800	3,006	1,120,806	627,250	216,056	277,500	0
1997	1,091,000	2,670	1,093,670	564,000	235,400	295,270	0
1998	1,125,000	2,700	1,127,700	609,000	230,500	284,200	0
<b>Total Selected Countries</b>							
1996	8,157,998	543,105	8,701,103	1,678,346	4,347,266	2,670,851	4,640
1997	8,169,710	544,264	8,713,974	1,687,837	4,263,715	2,758,422	5,000
1998	8,179,700	580,500	8,759,200	1,762,010	4,250,990	2,754,200	5,000

F = Forecast.

1/Calendar year for all countries. EU data include intra-EU trade.

2/FAS methodology for calculating the estimate has been revised. The estimate is based exclusively on the NASS foreca

Official NASS estimate will be available in January 1998. Production data represents only California.

Source: U.S. Agricultural Attache Reports.

**United States: Table Grape Exports**  
1993-1998 1/

Destination	1993	1994	1995	1996	1997	1998 2 /
Metric tons, net weight						
Canada	111,282	102,703	102,903	86,965	97,299	28,022
Hong Kong	18,267	21,082	28,159	38,632	58,132	5,291
Taiwan	12,898	15,107	12,784	16,359	11,974	1,385
United Kingdom	5,023	3,931	7,387	4,678	5,561	4,626
Philippines	5,955	8,946	9,034	12,703	15,756	1,439
Malaysia	4,018	4,228	6,470	5,887	7,494	750
Singapore	6,655	5,945	5,828	4,675	5,329	1,621
New Zealand	2,426	4,362	3,630	4,006	4,895	1,054
Russian Federation	9	166	230	668	1,497	588
Indonesia	4,357	4,038	5,020	4,778	5,294	197
All Others	32,923	48,347	37,884	35,658	55,615	8,597
<b>Total</b>	<b>203,813</b>	<b>218,855</b>	<b>219,329</b>	<b>215,009</b>	<b>268,846</b>	<b>53,570</b>

1/Calendar year data.

2/January through August 1998 data.

Source: U.S. Census data.

**United States: Table Grape Imports**  
1993-1998 1/

Origin	1993	1994	1995	1996	1997	1998 2/
Metric tons, net weight						
Chile	279,205	280,910	263,824	292,896	272,333	264,066
Mexico	41,305	41,074	80,492	60,033	75,713	101,032
South Africa	0	567	3,004	3,218	7,450	10,122
All Others	957	1,409	2,346	3,679	4,431	817
<b>Total</b>	<b>321,467</b>	<b>323,960</b>	<b>349,666</b>	<b>359,826</b>	<b>359,927</b>	<b>376,037</b>

1/Calendar year data.

2/January through August 1998 data.

Source: U.S. Census data.

## ALMOND SITUATION AND OUTLOOK

Almond production in selected countries in 1998/99 is forecast to decrease 29 percent to 329,040 metric tons, based on substantially smaller crops in the United States and Spain, the world's two largest producing countries. Selected country exports in 1998/99 are forecast to decrease by 14 percent to 214,082 tons. Increased world prices are likely in 1998/99 as fewer quantities of almonds reach the market. U.S. almond exports in 1998/99 are forecast at about 190,000, 7 percent below the previous season's shipments. The total value of U.S. almond exports in 1997/98 was \$842 million, down 6 percent from last season's record.

### United States

Because of large production downturns in the United States and Spain, 1998/99 almond supplies for the six surveyed countries will decline 14 percent from 1997/98. Production declines are expected in all surveyed countries, except Turkey. Almond exports from selected countries in 1998/99 are forecast at about 215,000 tons, down 14 percent from 1997/98.

U.S. almond production in 1998/99 (August - July) is forecast at about 245,000 metric tons, 29 percent below last season's record harvest, but 6 percent higher than the 1996/97 output. The crop was later than normal because of cool spring temperatures and intermittent rains which delayed development. Yields are reportedly variable by region, with light nut sets on some trees and heavy nut sets on others.

Total U.S. almond supplies in marketing year 1998/99 are forecast at 318,717 metric tons, down 13 percent from the previous season, as a smaller harvest more than offset a large buildup in stocks. Beginning stocks for 1998/99 are estimated at nearly 74,000 tons, more than triple the previous year's stock level as a result of the record 1997/98 production.

In 1998/99 U.S. almond exports are forecast at about 190,000 metric tons, 7 percent below

the previous year's shipments due to the smaller supplies. U.S. almond exports in 1997/98 reached a record 205,000 metric tons based on strong world demand.

In 1997/98, shelled almonds, including prepared and preserved, accounted for 93 percent of total U.S. almond exports. Major U.S. buyers for shelled almonds were Western Europe accounting for 66 percent (primarily Germany and Spain with 35 percent and 16.5 percent respectively) and Asia purchasing 17 percent (with Japan importing 64 percent and China 11 percent). In-shelled almond exports accounted for 7 percent of U.S. almond exports in 1997/98. Asia is the most significant importer of in-shell almonds, purchasing nearly 93 percent of the U.S. exports.

With partial funding through the Market Access Program, the U.S. almond industry expanded sales to China in 1997/98 by more than 50 percent. For the 1998/99 season, marketing efforts will continue to focus on China, Hong Kong, India, Japan, Taiwan and Thailand; while new market strategies will be initiated in Brazil, Panama, Philippines, and Russia.

### Spain

Spain's 1998/99 almond production is forecast at 40,000 tons, a 47 percent decrease



compared to the previous season. The lower crop is expected due to frosts in March and April and unfavorable weather during blooming that hampered pollination. Both the quality and the kernel size of the 1998/99 almond crop are expected to be good.

Exports in 1998/99 are forecast to be lower than last year, at 21,000 tons, due to the shorter crop. Other EU countries are the major destinations, representing about 90 percent of Spain's export markets. Exports reached 40,000 tons in 1997/98, about 19 percent above the previous year.

Almond imports in 1998/99 are expected to increase based on the expected smaller crop. Spanish almond imports totaled 14,727 tons in 1997/98, of which 12,776 tons were purchased from the United States.

The U.S. continues to be the dominant foreign supplier of almonds to Spain, and the expectations for greater import demand in 1998/99 should create further opportunities for U.S. exporters. U.S. almonds are generally preferred by slice and flour processors because of their uniformity and low breakage.

## **Turkey**

In 1998/99 almond production in Turkey is forecast at 14,000 tons, up 27 percent from the previous year.

Almond consumption is growing slowly in Turkey, largely due to the abundant availability of hazelnuts, which are a close substitute for almonds. Almost all of the increase in aggregate consumption is the result of increasing population, rather than increasing per capita consumption. Almonds generally are consumed whole as a snack food and only limited amounts are utilized in confectionary products.

## **Morocco**

In 1998/99, Morocco's almond production is

forecast at 8,000 tons, down 27 percent from last year's bumper crop. The drop in production has been attributed to poor weather conditions, especially lack of rainfall, during the February-March period which negatively affected fruit settings. Production will continue to be limited by the heavy dependence on rainfall, generally poor management, and the lack of technical know how.

Over the next three to five years, U.S. almond exports to Morocco may increase in response to the fluctuating local production and the steadily increasing demand. Morocco has no clear policy to expand almond production to meet the increasing local demand.

## **Italy**

Almond production in 1998/99 is forecast at 9,000 tons, 18 percent lower than the previous crop. For the third year in a row, weather conditions have been adverse, severely affecting crop development.

Prospects for the 1998/99 marketing year for U.S. exports to Italy are much brighter, due to the poor production prospects in Spain, as well as Greece. According to some traders, Italian imports of U.S. shelled almonds in 1998/99 could reach a record 10,000 tons. Italy had a leading role in the world almond market up until a few decades ago, but in recent years exports have gradually decreased to today's negligible levels. Imports, on the other hand, have been rising to meet the growing demand of the domestic confectionary industry.

The current EU ad valorem customs duty for shelled almonds is 2 percent, for imports within the EU-wide quota of 90,000 tons, and 4.7 percent for imports over the quota. The EU export subsidy for shelled almonds is currently set at 99 lire per kilogram.

## **Greece**

Total almond production in 1998/99 is forecast at 13,100 tons (shelled basis), a 10 percent

reduction from last season. The quality of the new crop is reported to be very good to excellent. Greece is expected to purchase 700 tons of almonds in 1998/99, up 4 percent from 1997/98. Imported nuts are primarily used in the confectionary and chocolate industries. Almond imports take place in the second half of the marketing period when stocks are at reasonable levels.

At present, 25 percent of consumed nuts are processed and packed in snack type packages, sales of which are expected to increase in the years to come. There are 10-15 processors and packers in the country who also are the major importers/exporters and cover 75-80 percent of the total nuts marketed. When the total supply of tree nuts is not sufficient to cover domestic needs and some of export contracts, imports are necessary. When this happens almonds are traditionally purchased from the United States.

*(For further information on supply, distribution, and trade contact DeVon Camel at 202-720-0897. For information on U.S. marketing opportunities, contact Ingrid Mohn at 202-720-5330)*

# ALMONDS: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES

Country/ Marketing Year 1/	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks
Metric tons, shelled basis							
<b>Greece</b>							
1996/97	1,153	12,800	480	14,433	260	12,500	1,673
1997/98	1,673	14,500	500	16,673	1,500	12,600	2,573
1998/99 F	2,573	13,100	700	16,373	1,373	12,550	2,450
<b>Italy</b>							
1996/97	500	6,000	14,728	21,228	1,071	19,657	500
1997/98	500	11,000	13,000	24,500	1,000	22,500	1,000
1998/99 F	1,000	9,000	14,500	24,500	1,000	23,000	500
<b>Morocco</b>							
1996/97	957	5,100	43	6,100	0	6,000	100
1997/98	100	11,000	10	11,110	0	10,800	310
1998/99 F	310	8,000	30	8,340	0	8,200	140
<b>Spain</b>							
1996/97	8,500	60,000	20,200	88,700	33,600	51,100	4,000
1997/98	4,000	75,000	16,000	95,000	40,000	47,000	8,000
1998/99 F	8,000	40,000	20,000	68,000	21,000	45,000	2,000
<b>Turkey</b>							
1996/97	2,500	14,300	170	16,970	664	14,706	1,600
1997/98	1,600	11,000	3,000	15,600	100	14,500	1,000
1998/99 F	1,000	14,000	2,000	17,000	200	14,800	2,000
<b>United States 2/ 3/ 4/</b>							
1996/97	29,883	231,332	72	261,287	170,028	69,356	21,903
1997/98	21,903	343,370	55	365,328	205,215	86,436	73,677
1998/99 F	73,677	244,940	100	318,717	190,509	82,668	45,540
<b>Total</b>							
1996/97	43,493	329,532	35,693	408,718	205,623	173,319	29,776
1997/98	29,776	465,870	32,565	528,211	247,815	193,836	86,560
1998/99 F	86,560	329,040	37,330	452,930	214,082	186,218	52,630

F =Forecast.

1/ Marketing Years: August-July for the United States; July-June for Morocco; September-August for Spain, Italy, Turkey; October-September for Greece.

2/ U.S. import data are from Bureau of the Census with input from the Almond Board of California (ABC). Import forecast originates with Foreign Agricultural Service/USDA.

3/ U.S. export and stock data for 1996/97 and 1997/98 come from the ABC; 1998/99 export forecast based on preliminary data from the ABC; 1998/99 stock estimate from ABC.

4/ U.S. production forecast for 1998/99 by the National Agricultural Statistics Service.

SOURCES: U.S. Agricultural Attaché Reports, Bureau of Census, Almond Board of California, and NASS/USDA.

## WALNUT SITUATION AND OUTLOOK

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Walnut production in selected countries in 1998/99 is forecast at 607,430 metric tons (in-shell basis), 5 percent below the previous year's output. The United States is expected to account for most of the decrease in world walnut output. Selected country walnut exports in 1998/99 are forecast to decrease 4 percent to 184,650 tons. China, the world's largest walnut exporter, is expected to account for nearly all of the expected decrease in world exports. China's exports are expected to be down due to strong domestic demand. U.S. walnut exports in 1998/99 are expected to approximate the previous year's shipments.

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### United States

The 1998/99 U.S. walnut crop is forecast at 199,580 tons, 18 percent lower than the 1997/98 record crop, but 6 percent above 1996/97 output. The production decrease is mainly due to average yields expected from the mid-season and late varieties. Seven to ten days of rains in early May hit the late varieties and disrupted the bloom.

U.S. exports in 1998/99 are forecast at 105,000 tons, a marginal increase from the previous year, but 8 percent below the 1996/97 shipments. In-shell shipments to the major European markets, such as Germany, Italy, Spain and the Netherlands were lower in 1997/98. However, in-shell shipments to the Middle East increased significantly. Shelled shipments to most markets were much higher in 1997/98 and partially offset the smaller in-shell shipments. Demand for U.S. walnuts, domestically and from Canada, were also lower for in-shelled products, but higher for shelled product.

With partial funding through the Market Access Program, the U.S. walnut industry expanded export sales in 1997/98 to Israel by \$1.4 million, reaching a record \$11.9 million. A consumer awareness campaign was initiated, focusing in-store, TV and newspaper advertising aimed at changing consumer perception of

nuts. Israeli consumers increased their consumption of walnuts as they learned more about the health attributes, quality and versatility of U.S. walnuts.

### China

Walnut production in 1998/99 is forecast to increase 2 percent to 255,000 tons in 1998. This season's marginal increase is mainly due to a low yields in several of the major producing provinces.

China's walnut exports for 1998/99 are forecast to decline to 35,000 tons, due to strong domestic demand. Major markets for China's exports are the United Kingdom, Japan, Canada, Australia and Lebanon. Walnuts in China are considered a popular health snack and are also consumed in a wide range of value-added products, including drinks, powders and processed foods.

### Turkey

The 1998/99 Turkish walnut crop is forecast up slightly from the previous year. Based on the shift to better varieties, sources forecast steadily increasing production over the next few years.

Per capita consumption is relatively stable in Turkey, with most of the long-term increase in



aggregate consumption resulting from increases in population. Fifty percent of the Turkish walnut crop is utilized for home consumption and the remainder is marketed.

## India

India's 1998/99 (October-September) walnut production is forecast at a record 30,000 tons, due to more trees coming into production and favorable weather conditions. Indian walnut exports are forecast at 16,000 tons in 1998/99, up slightly from the 1997/98 volume. Export sales to traditional European markets have been marginal over the past three seasons, due to the intense competition from East European suppliers. Given high tariffs (56.6 percent) and strong domestic production, imports have not occurred in the recent years.

Domestic consumption of walnuts in 1998/99 is forecast to increase by 5 percent. Larger supplies and anticipated lower prices are expected to spur consumption. Prices are expected to be higher for imported almonds due to a smaller U.S. crop (the major supplier to India).

## France

In 1998/99, France's walnut production is forecast at 28,000 tons, up 19 percent from the 1997/98 harvest. Yields are up from 1997/98, due to the resumption of rainfall by late August and early September, which reduced the risk of damage. Diseases have been minimal, leading to an excellent fruit quality.

The U.S. remains France's leading supplier of in-shell walnuts in 1997/98 and is expected to keep its leading position in 1998/99. Market opportunities for U.S. walnuts in France during the 1998/99 season will remain limited, due to a stagnant domestic demand and a large domestic production.

The total consumption of walnuts in France is

relatively stable, at about 21,000 tons. Roughly 15 percent of the walnuts consumed in France are bought directly from farmers. Large supermarkets account for 39 percent of domestic sales, while smaller grocery stores and street vendors account for the remaining sales.

## Italy

The 1998/99 crop is forecast at 15,000 tons, down 29 percent from the previous year, due to unfavorable weather, with reported damage during the fruit-setting period. Unusually high temperatures prevailing last June also caused fruit to drop from the trees, further reducing productivity.

Italy's walnut imports for 1998/99 are forecast at 15,000 tons, up fifty percent from the previous year based on the smaller harvest. The U.S. is the major supplier of walnuts to the Italian market, with minor quantities imported from France, Romania and Bulgaria.

*(For further information on supply, distribution, and trade contact DeVon Camel at 201-720-0897. For information on marketing opportunities, contact Ingrid Mohn at 202-720-5330)*

# WALNUTS: PRODUCTION, SUPPLY AND DISTRIBUTION IN SELECTED COUNTRIES

Country/ Marketing Year	Beginning Stocks	Production	Imports	Total Supply and Distribution	Exports	Domestic Consumption	Ending Stocks
Metric tons, in-shell basis							
<b>Chile</b>							
1996/97	150	12,550	3	12,703	10,867	1,661	175
1997/98	175	12,850	0	13,025	11,150	1,715	160
1998/99 F	160	12,850	0	13,010	11,150	1,700	160
<b>China</b>							
1996/97	0	238,000	50	238,050	50,000	188,050	0
1997/98	0	249,000	124	249,124	45,663	203,461	0
1998/99 F	0	255,000	500	255,500	35,000	220,500	0
<b>France</b>							
1996/97	0	22,050	11,200	33,250	14,200	19,050	0
1997/98	0	23,500	12,500	36,000	15,500	20,500	0
1998/99 F	0	28,000	9,000	37,000	16,000	21,000	0
<b>India</b>							
1996/97	3,200	29,000	0	32,200	13,780	12,000	6,420
1997/98	6,420	25,000	0	31,420	15,000	12,800	3,620
1998/99 F	3,620	30,000	0	33,620	16,000	13,500	4,120
<b>Italy</b>							
1996/97	500	12,000	15,848	28,348	1,000	26,348	1,000
1997/98	1,000	21,000	10,000	32,000	1,200	29,800	1,000
1998/99 F	1,000	15,000	15,000	31,000	1,000	29,000	1,000
<b>Turkey</b>							
1996/97	3,900	66,000	1,254	71,154	952	66,002	4,200
1997/98	4,200	66,000	2,000	72,200	700	67,000	4,500
1998/99 F	4,500	67,000	2,000	73,500	500	68,000	5,000
<b>United States 2/3/</b>							
1996/97	65,039	188,696	6,445	260,180	113,683	97,522	48,975
1997/98 4/	48,975	244,030	435	293,440	103,827	108,672	80,941
1998/99 F	80,941	199,580	6,000	286,521	105,000	128,121	53,400
<b>TOTAL</b>							
1996/97	72,789	568,296	34,800	675,885	204,482	410,633	60,770
1997/98	60,770	641,380	25,059	727,209	193,040	443,948	90,221
1998/99 F	90,221	607,430	32,500	730,151	184,650	481,821	63,680

1/ Marketing Years: March-February for Chile; August-July for the United States; September-August for Italy and Turkey; October-September for China, France, and India.

2/ U.S. export and import data come from the Bureau of the Census with forecasts by USDA/Foreign Agricultural Service.

3/ For conversion of shelled exports, U.S. domestic shelling ratios of .410 and .411 for 1996/97 and 1997/98 originate from calculations of data from the National Agricultural Statistics Service. FAS converted imports to an in-shell basis using U.S. shelling ratios.

4/ U.S. production forecast for 1998/99 by the National Agricultural Statistics Service.

F Forecast.

## CANNED DECIDUOUS FRUIT SITUATION FOR SELECTED COUNTRIES

Revised aggregate world production and exports of canned fruit for 1997/98 are both estimated to be down 11 percent from the previous season. While production was down by 182,000 tons, exports were down only 102,000 tons as stocks were drawn down to meet demand. World production in 1997/98 was down for all canned fruit due to unfavorable weather conditions in Europe. The outlook for Northern Hemisphere in 1998/99 is for production to increase by 7 percent and exports by 3 percent. Nevertheless, Northern Hemisphere canned peach production in 1998/99 is down from the high levels achieved in previous year's, due to poor spring weather conditions. Large U.S. canned peach stocks are expected to more than offset a decrease in U.S. production in 1998/99.

### CANNED PEACHES

World canned peach production in 1997/98 is revised down by one percent to 1,025,274 tons. Production in the Northern Hemisphere for the 1998/99 marketing year is forecast at 839,200 tons up 5 percent from the previous year's revised forecast. Forecasts for the Southern Hemisphere's 1998/99 canned fruit production are not available.

EU production for marketing year 1997/98 is reduced 3 percent from the previous estimate to 409,080 tons. Production in the Southern Hemisphere for 1997/98 remains unchanged from the previous forecast.

Exports for 1997/98 from the world's major suppliers is revised upward, from 424,800 to 484,808 tons, an increase of 14 percent. Exports from the EU were previously estimated at 302,000 tons and are now placed at 360,310 tons up 19 percent. The reason for this increase is that EU canners maintained sufficient stocks to fill demand. Beginning EU stocks, which were previously estimated at only 36,115 tons are now placed at almost twice that figure. Consequently, EU exports for 1997/98 were off the previous three year average of 436,000 tons by only 17 percent

compared to production, which was down 27 percent. EU production for the last two years is down due to unfavorable weather. Production for the 1997/98 season is off 16 percent from the 1990/91 to 1996/97 seven year average. Production for 1998/99 is down 20 percent from this seven year average.

Estimates for the 1997/98 U.S. crop remain unchanged at 380,894 tons. The current 1998/99 crop is estimated to be down from last year's crop by 4 percent to 366,220 tons. U.S. stock estimates have been revised upward to 116,000 tons, double the quantity previously estimated. U.S. stocks now account for 81 percent of Northern Hemisphere stocks and 12 percent of the total Northern Hemisphere supply.

### CANNED PEARS

World canned pear production for 1997/98 is revised upward by one percent to 151,000 tons. Exports are up 3 percent to 113,000 tons and stocks were reduced by 7,400 tons. EU production is revised up by 4,000 tons to 85,470 tons, while production in the Southern Hemisphere is reduced by 4 percent to 64,800 tons. Production for the Northern Hemisphere in 1998/99 is forecast at 90,625 tons, up 5

percent.

Canned pear exports from major producers in 1997/98 are now estimated at 113,336 tons, up 3 percent from the previous forecast. Exports from the Northern Hemisphere are revised upward by 6,000 tons while shipments from the Southern Hemisphere are revised downward by 2,000 tons. Exports for the Northern Hemisphere for 1998/99 marketing year are forecast at the previous year's level of 61,000 tons.

### **CANNED MIXED FRUIT**

World production and exports of canned mixed fruit for the 1997/98 marketing year are revised downward by 4 and 9 percent respectively from previous estimates. EU production and exports are reduced 1,400 tons and 6,500 tons respectively, and Southern Hemisphere production and exports are down 5,300 tons and 6,700 tons respectively.

Northern Hemisphere production for the 1998/99 marketing year is forecast at 105,800 tons, up 16 percent from the previous year's level due to increased production of canning peaches available for mixing with other fruits.

### **CANNED APRICOTS**

The 1997/98 canned apricot output is revised upward by 6 percent or 4,000 tons to 74,000 tons. Southern Hemisphere production and exports are revised upward by 16 and 13 percent respectively while Northern Hemisphere production and exports are revised downward by 14 and 15 percent respectively.

Production for the Northern Hemisphere for the 1998/99 marketing year is forecast at 29,000 tons up 8 percent from last year's level.

*(For further information on canned fruit production and trade contact Robert Knapp 202-720-9792. For information on marketing contact Pamela McKenzie, 202-720-2252.)*



## Canned Peaches: Production, Supply and Distribution

Country	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks
--Metric Tons Net Weight 1/ --							
<b>Northern Hemisphere</b>							
<b>France</b>							
1996/97	500	17,430	31,032	48,962	3,266	40,696	5,000
1997/98	5,000	17,080	32,254	54,334	4,310	40,504	9,520
1998/99 F	9,520	8,000	34,000	51,520	4,000	40,000	7,520
<b>Greece</b>							
1996/97	24,305	378,485	1,323	404,113	333,907	8,000	62,206
1997/98	62,206	176,000	4,000	242,206	230,000	7,000	5,206
1998/99 F	5,206	275,000	2,000	282,206	265,000	6,000	11,206
<b>Italy</b>							
1996/97	0	38,000	26,000	64,000	38,000	23,000	3,000
1997/98	3,000	25,000	28,000	56,000	36,000	20,000	0
1998/99 F	0	34,000	28,000	62,000	38,000	20,000	4,000
<b>Spain</b>							
1996/97	12,700	143,500	2,400	158,600	47,850	105,000	5,750
1997/98	5,750	191,000	1,800	198,550	90,000	105,000	3,550
1998/99 F	3,550	150,800	2,550	156,900	50,000	105,000	1,900
<b>Total EU</b>							
1996/97	37,505	577,415	60,755	675,675	423,023	176,696	75,956
1997/98	75,956	409,080	66,054	551,090	360,310	172,504	18,276
1998/99 F	18,276	467,800	66,550	552,626	357,000	171,000	24,626
<b>Japan</b>							
1996/97	6,000	6,000	51,649	63,649	4	60,645	3,000
1997/98	3,000	5,500	51,541	60,041	1	57,540	2,500
1998/99 F	2,500	5,000	52,000	59,500	2	57,498	2,000
<b>United States</b>							
1996/97	40,285	381,711	28,087	450,083	16,006	342,222	91,855
1997/98	91,855	380,894	21,985	494,734	18,997	359,387	116,350
1998/99 F	116,350	366,400	20,500	503,250	21,000	366,000	116,250

## Canned Peaches: Production, Supply and Distribution

Country	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks
--Metric Tons Net Weight 1/ --							
<b>Southern Hemisphere</b>							
<b>Argentina</b>							
1996/97	4,000	55,000	8,000	67,000	5,000	60,000	2,000
1997/98	2,000	70,000	8,000	80,000	6,000	71,000	3,000
1998/99	NA	NA	NA	NA	NA	NA	NA
<b>Australia</b>							
1996/97	18,435	33,950	1,327	53,712	8,586	26,500	18,626
1997/98	18,626	34,000	1,200	53,826	10,000	27,000	16,826
1998/99	NA	NA	NA	NA	NA	NA	NA
<b>Chile</b>							
1996/97	4,248	39,000	48	43,296	34,292	8,800	204
1997/98	204	39,000	0	39,204	29,500	8,800	904
1998/99	NA	NA	NA	NA	NA	NA	NA
<b>South Africa</b>							
1996/97	19,184	77,786	39	97,009	60,000	24,079	12,930
1997/98	12,930	86,800	20	99,750	60,000	24,000	15,750
1998/99	NA	NA	NA	NA	NA	NA	NA
<b>Total Southern Hemisphere</b>							
1996/97	45,867	205,736	9,414	261,017	107,878	119,379	33,760
1997/98	33,760	229,800	9,220	272,780	105,500	130,800	36,480
1998/99	NA	NA	NA	NA	NA	NA	NA
<b>Total</b>							
1996/97	129,657	1,170,862	149,905	1,450,424	546,911	698,942	204,571
1997/98	204,571	1,025,274	148,800	1,378,645	484,808	720,231	173,606
1998/99	NA	NA	NA	NA	NA	NA	NA

F = Forecast

Note: For Calendar year reference, MY 1996/97 would become CY 1996

1/ One metric ton 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans

Source: U.S. Agricultural Attache Reports

## Canned Pears: Production, Supply and Distribution

Country	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks
--Metric Tons Net Weight 1/ --							
<b>Northern Hemisphere</b>							
<b>France</b>							
1996/97	5,140	23,420	23,222	51,782	2,141	41,641	8,000
1997/98	8,000	19,570	27,508	55,078	6,336	41,602	7,140
1998/99 F	7,140	21,000	24,000	52,140	7,000	41,000	4,140
<b>Italy</b>							
1996/97	18,000	51,000	200	69,200	43,400	13,800	12,000
1997/98	12,000	42,000	300	54,300	40,000	12,300	2,000
1998/99 F	2,000	51,000	0	53,000	42,000	11,000	0
<b>Spain</b>							
1996/97	8,475	18,800	140	27,415	19,000	7,700	715
1997/98	715	23,900	260	24,875	15,000	7,500	2,375
1998/99 F	2,375	17,800	300	20,475	12,000	7,500	975
<b>TOTAL EU</b>							
1996/97	31,615	93,220	23,562	148,397	64,541	63,141	20,715
1997/98	20,715	85,470	28,068	134,253	61,336	61,402	11,515
1998/99 F	11,515	89,800	24,300	125,615	61,000	59,500	5,115
<b>Japan</b>							
1996/97	200	667	9,044	9,911	0	9,411	500
1997/98	500	750	6,815	8,065	0	7,565	500
1998/99 F	500	825	7,000	8,325	0	7,825	500
<b>Total Northern Hemisphere</b>							
1996/97	31,815	93,887	32,606	158,308	64,541	72,552	21,215
1997/98	21,215	86,220	34,883	142,318	61,336	68,967	12,015
1998/99 F	12,015	90,625	31,300	133,940	61,000	67,325	5,615

## Canned Pears: Production, Supply and Distribution

Country	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks
-- Metric Tons Net Weight 1/ --							
<b>Southern Hemisphere</b>							
<b>Australia</b>							
1996/97	16,869	39,500	162	56,531	32,662	12,700	11,169
1997/98	11,169	40,000	200	51,369	32,000	13,000	6,369
1998/99	NA	NA	NA	NA	NA	NA	NA
<b>South Africa</b>							
1996/97	8,485	20,026	29	28,540	20,125	5,205	3,210
1997/98	3,210	24,800	30	28,040	20,000	5,000	3,040
1998/99	NA	NA	NA	NA	NA	NA	NA
<b>Total Southern Hemisphere</b>							
1996/97	25,354	59,526	191	85,071	52,787	17,905	14,379
1997/98	14,379	64,800	230	79,409	52,000	18,000	9,409
1998/99	NA	NA	NA	NA	NA	NA	NA
<b>Total</b>							
1996/97	57,169	153,413	32,797	243,379	117,328	90,457	35,594
1997/98	35,594	151,020	35,113	221,727	113,336	86,967	21,424
1998/99	NA	NA	NA	NA	NA	NA	NA

F = Forecast

Note: For Calendar year reference, MY 1996/97 would become CY 1996

1/ One metric ton 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans

Source: U.S. Agricultural Attache Reports

## Canned Fruit Mixtures: Production, Supply and Distribution

Country	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks
-- Metric Tons Net Weight 1/ --							
<b>Northern Hemisphere</b>							
<b>France</b>							
1996/97	1,000	18,550	34,617	54,167	9,714	34,563	9,890
1997/98	9,890	14,870	35,197	59,957	10,620	35,067	14,270
1998/99 F	14,270	11,000	31,000	56,270	11,000	34,500	10,770
<b>Greece</b>							
1996/97	756	4,300	167	5,223	4,139	850	234
1997/98	234	1,809	500	2,543	1,600	800	143
1998/99 F	143	1,500	600	2,243	1,350	800	93
<b>Italy</b>							
1996/97	0	91,000	3,600	94,600	85,000	8,800	800
1997/98	800	72,000	5,000	77,800	69,000	8,800	0
1998/99 F	0	91,000	4,000	95,000	85,000	8,000	2,000
<b>TOTAL EU</b>							
1996/97	1,756	113,850	38,384	153,990	98,853	44,213	10,924
1997/98	10,924	88,679	40,697	140,300	81,220	44,667	14,413
1998/99 F	14,413	103,500	35,600	153,513	97,350	43,300	12,863
<b>Japan</b>							
1996/97	500	2,771	11,876	15,147	3	14,644	500
1997/98	500	2,490	9,764	12,754	9	12,245	500
1998/99 F	500	2,300	10,000	12,800	10	12,290	500
<b>Total Northern Hemisphere</b>							
1996/97	2,256	116,621	50,260	169,137	98,856	58,857	11,424
1997/98	11,424	91,169	50,461	153,054	81,229	56,912	14,913
1998/99	14,913	105,800	45,600	166,313	97,360	55,590	13,363



## Canned Fruit Mixtures: Production, Supply and Distribution

Country	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks
-- Metric Tons Net Weight 1/ --							
<b>Southern Hemisphere</b>							
<b>Australia</b>							
1996/97	2,478	29,000	0	31,478	13,584	16,000	1,894
1997/98	1,894	30,000	0	31,894	14,000	16,000	1,894
1998/99	NA	NA	NA	NA	NA	NA	NA
<b>Chile</b>							
1996/97	33	7,350	107	7,490	7,138	310	42
1997/98	42	7,350	0	7,392	6,900	310	182
1998/99	NA	NA	NA	NA	NA	NA	NA
<b>South Africa</b>							
1996/97	21,000	32,507	73	53,580	36,000	10,250	7,330
1997/98	7,330	43,500	170	51,000	36,000	10,000	5,000
1998/99	NA	NA	NA	NA	NA	NA	NA
<b>Total Southern Hemisphere</b>							
1996/97	23,511	68,857	180	92,548	56,722	26,560	9,266
1997/98	9,266	80,850	170	90,286	56,900	26,310	7,076
1998/99	NA	NA	NA	NA	NA	NA	NA
<b>Total</b>							
1996/97	25,767	185,478	50,440	261,685	155,578	85,417	20,690
1997/98	20,690	172,019	50,631	243,340	138,129	83,222	21,989
1998/99	NA	NA	NA	NA	NA	NA	NA

F = Forecast

Note: For Calendar year reference, MY 1996/97 would become CY 1996

1/ One metric ton 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans

Source: U.S. Agricultural Attache Reports

## Canned Apricots: Production, Supply, and Distribution

Country	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks
--Metric Tons Net Weight 1/ --							
<b>Northern Hemisphere</b>							
<b>Greece</b>							
1996/97	405	20,130	107	20,642	18,298	1,200	1,144
1997/98	1,144	12,960	500	14,604	13,000	1,200	404
1998/99 F	404	10,300	500	11,204	10,000	1,000	204
<b>Spain</b>							
1996/97	580	19,350	90	20,020	14,900	4,500	620
1997/98	620	14,100	40	14,760	7,000	5,160	2,600
1998/99 F	2,600	19,000	20	21,620	13,000	5,620	3,000
<b>Total Northern Hemisphere</b>							
1996/97	985	39,480	197	40,662	33,198	5,700	1,764
1997/98	1,764	27,060	540	29,364	20,000	6,360	3,004
1998/99 F	3,004	29,300	520	32,824	23,000	6,620	3,204
<b>Southern Hemisphere</b>							
<b>Australia</b>							
1996/97	414	9,400	715	10,529	2,000	8,115	414
1997/98	414	9,500	700	10,614	2,200	8,200	214
1998/99	NA	NA	NA	NA	NA	NA	NA
<b>South Africa</b>							
1996/97	5,200	36,140	20	41,360	29,546	5,404	6,410
1997/98	6,410	37,500	20	43,930	32,430	5,500	6,000
1998/99	NA	NA	NA	NA	NA	NA	NA
<b>Total</b>							
1996/97	6,599	85,020	932	92,551	64,744	19,219	8,588
1997/98	8,588	74,060	1,260	83,908	54,630	20,060	9,218
1998/99	NA	NA	NA	NA	NA	NA	NA

F = Forecast

Note: For Calendar year reference, MY 1996/97 would become CY 1996

1/ One metric ton 48.99 standard 45-lb. net cases of 24 x 2 1/2 cans

Source: U.S. Agricultural Attache Reports

**United States: Canned Peach Imports**  
Marketing Year June/May

Country	1993/94	1994/95	1995/96	1996/97	1997/98
-- Metric Tons Net Weight 1/ --					
Greece	15,515	16,743	10,489	19,475	4,586
Spain	829	233	31	4,324	11,424
South Africa	3,319	1,693	1,546	2,717	3,863
Chile	1,076	1,637	1,755	1,166	447
China	2	97	199	244	728
Japan	0	0	0	69	7
France	42	49	44	56	102
Italy	316	4	3	19	13
Other	112	283	33	17	814
<b>Grand Total</b>	<b>21,211</b>	<b>20,739</b>	<b>14,100</b>	<b>28,087</b>	<b>21,984</b>

Source: U.S. Census Bureau

1/ One metric ton equals 48.99 cases standard cases of 24 x 2 1/2 cans

**United States: Canned Peach Exports**  
Marketing Year June/May

Country	1993/94	1994/95	1995/96	1996/97	1997/98
--Metric Tons Net Weight 1/ --					
Canada	2,809	3,908	5,589	4,192	7,452
Mexico	1,400	454	294	451	950
Japan	5,674	4,595	4,290	2,559	2,917
Korea	820	2,314	2,495	1,593	569
Taiwan	1,719	1,259	1,852	1,295	912
Singapore	1,194	1,164	958	900	228
Hong Kong	1,768	943	867	809	287
Philippines	382	1,018	617	442	119
Costa Rica	558	441	752	494	218
Germany	31	74	48	233	346
Guatemala	176	200	186	217	188
El Salvador	162	117	186	214	218
Saudi Arabia	460	137	166	201	467
Russian Federation	67	185	176	1,077	579
Other	2,089	1,960	2,817	1,329	3,547
<b>Grand Total</b>	<b>19,309</b>	<b>18,769</b>	<b>21,293</b>	<b>16,006</b>	<b>18,997</b>

Source: U.S. Census Bureau

1/ One metric ton equals 48.99 cases standard cases of 24 x 2 1/2 cans

**United States: Canned Pear Exports**  
Marketing Year June/May

Country	1993/94	1994/95	1995/96	1996/97	1997/98
-- Metric Tons Net Weight 1/ --					
Canada	1,554	2,795	5,669	2,703	3,261
Mexico	164	25	0	77	14
Germany	53	170	82	115	95
United Kingdom	0	14	90	85	219
Japan	402	485	623	311	290
Hong Kong	29	51	84	49	6
Singapore	88	113	9	41	10
Thailand	4	19	6	39	22
Malaysia	0	13	16	31	19
Russian Federation	32	110	53	43	0
Saudi Arabia	55	36	64	15	58
United Arab Emirates	5	555	79	0	390
Other	504	334	540	197	323
<b>Grand Total</b>	<b>2,890</b>	<b>4,720</b>	<b>7,315</b>	<b>3,706</b>	<b>4,707</b>

Source: U.S. Census Bureau

1/ One metric ton equals 48.99 cases standard cases of 24 x 2 1/2 cans

**United States: Canned Fruit Mixtures Exports**  
Marketing Year June/May

Country	1993/94	1994/95	1995/96	1996/97	1997/98
-- Metric Tons Net Weight 1/ --					
Canada	5,677	5,635	5,531	7,422	8,512
Mexico	547	668	100	185	520
Japan	6,205	5,612	4,163	3,555	2,928
Philippines	1,289	2,801	4,313	3,804	700
Hong Kong	3,999	3,915	2,793	1,970	606
Singapore	2,575	4,476	3,124	1,826	999
Taiwan	1,106	971	622	416	626
Korea	208	720	238	421	689
Panama	863	744	637	597	1,148
El Salvador	266	283	360	337	379
Costa Rica	712	608	831	834	1,230
Saudi Arabia	1,387	458	1,055	820	1,182
Other	2,854	896	2,115	2,762	2,841
<b>Grand Total</b>	<b>27,688</b>	<b>27,787</b>	<b>25,882</b>	<b>24,949</b>	<b>22,360</b>

Source: U.S. Census Bureau

1/ One metric ton equals 48.99 cases standard cases of 24 x 2 1/2 cans

## U.S. Exports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country Region		Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997	Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997
Fresh Apples	MT										
Canada		7,752	7,254	79,944	87,551	88,955	5,612	5,392	56,908	66,620	63,812
Mexico		6,526	5,461	92,992	61,335	93,537	3,513	3,059	46,258	34,177	46,524
Indonesia		9,218	424	71,501	10,540	73,491	5,035	184	41,797	5,999	42,923
Hong Kong		5,721	5,560	45,529	44,058	46,878	3,380	3,093	26,196	24,227	27,052
Taiwan		3,362	6,004	108,341	107,795	113,819	2,021	3,668	71,335	67,593	74,674
Other Countries		12,990	10,182	264,396	199,442	273,069	7,077	5,868	151,424	111,980	157,386
Subtotal:----		45,568	34,886	662,702	510,722	689,749	26,638	21,265	393,918	310,596	412,371
Fresh Pears	MT										
European Union		0	90	7,201	19,570	7,471	0	60	3,418	9,044	3,539
Canada		7,915	5,908	34,635	41,127	40,526	4,592	3,501	27,381	27,125	30,807
Mexico		2,251	2,862	29,632	43,724	34,021	1,127	1,579	14,225	22,737	16,380
Brazil		60	0	16,964	14,942	19,378	43	0	7,303	6,198	8,660
Taiwan		139	0	4,682	3,521	5,215	68	0	2,942	1,730	3,207
Other Countries		295	304	18,063	22,861	19,798	217	263	12,401	13,440	13,460
Subtotal:----		10,660	9,164	111,175	145,745	126,409	6,047	5,403	67,670	80,273	76,052
Fresh Apricots	MT										
European Union		4	13	286	70	286	5	10	408	227	408
Canada		76	359	4,353	3,698	4,366	106	322	4,575	4,330	4,597
Mexico		0	181	1,224	1,954	1,224	0	126	986	1,531	986
Taiwan		39	17	147	645	372	66	22	188	706	394
Japan		0	25	85	77	85	0	20	97	83	97
Other Countries		39	36	159	250	271	52	30	165	519	256
Subtotal:----		158	632	6,253	6,695	6,604	229	531	6,418	7,397	6,738
Fresh Cherries	MT										
European Union		1,066	600	9,565	11,072	10,369	2,935	1,275	21,306	23,626	21,988
Canada		473	197	7,230	6,754	7,263	1,093	468	17,758	13,420	17,824
Hong Kong		132	19	2,758	3,172	2,764	384	20	6,978	8,194	6,989
Taiwan		147	251	4,917	5,853	4,917	494	344	15,536	17,759	15,536
Japan		9	12	12,943	8,946	13,003	36	60	74,220	47,061	74,257
Other Countries		132	31	1,085	1,113	1,085	295	82	3,548	3,233	3,548
Subtotal:----		1,959	1,109	38,499	36,910	39,400	5,237	2,248	139,346	113,294	140,144
Fresh Peach/Nect	MT										
Canada		10,283	9,094	48,824	34,205	51,869	7,879	6,936	41,188	32,616	44,366
Mexico		5,780	5,427	13,407	10,640	15,270	2,482	2,473	6,460	5,283	7,451
Brazil		77	78	499	169	843	69	18	473	139	713
Hong Kong		416	776	3,630	2,360	3,668	358	659	2,775	1,901	2,817
Taiwan		6,834	5,270	23,685	12,705	26,329	9,044	6,727	29,449	16,820	32,499
Other Countries		1,591	1,333	4,586	3,334	5,366	1,330	1,101	4,209	2,856	4,892
Subtotal:----		24,981	21,980	94,630	63,412	103,345	21,161	17,914	84,554	59,615	92,737
Fr. Plums/Prunes	MT										
Canada		6,232	5,485	22,159	16,309	25,023	5,163	5,345	18,644	17,240	21,232
Mexico		1,147	1,180	2,833	2,414	4,796	695	738	1,764	1,528	2,862
Malaysia		466	151	1,557	286	1,675	350	132	1,154	256	1,281
Hong Kong		3,759	2,875	10,069	5,210	12,147	3,740	2,953	9,215	5,056	11,067
Taiwan		3,594	5,315	19,105	9,102	20,835	3,384	4,969	16,719	8,389	18,123
Other Countries		1,547	1,561	5,066	4,498	7,430	1,293	1,483	4,606	4,488	6,659
Subtotal:----		16,745	16,566	60,789	37,821	71,906	14,625	15,621	52,103	36,959	61,224
Fr. Avocados	MT										
European Union		55	649	2,449	950	2,501	148	641	2,675	1,233	2,817
Canada		127	107	1,172	948	1,316	130	109	1,342	1,078	1,518
Korea, Republic o		8	3	83	40	91	19	5	161	65	175
Hong Kong		0	0	80	45	80	0	0	135	121	135
Japan		0	19	1,784	732	1,784	0	10	3,473	1,155	3,473
Other Countries		0	5	47	103	48	0	4	88	172	96
Subtotal:----		190	783	5,615	2,817	5,819	297	770	7,875	3,824	8,215
Fr. Kiwifruit	MT										
Canada		97	82	3,208	3,965	3,246	110	118	3,397	5,053	3,449
Mexico		0	0	303	437	303	0	0	268	344	268
Russian Federatio		0	0	71	57	71	0	0	70	81	70
Korea, Republic o		0	0	1,558	0	1,558	0	0	2,787	0	2,787
Hong Kong		0	0	213	187	213	0	0	383	332	383
Other Countries		0	0	28	962	47	0	0	61	1,245	79
Subtotal:----		97	82	5,381	5,608	5,438	110	118	6,966	7,055	7,036
Fresh Grapes	MT										
Canada		12,973	9,264	57,313	54,223	91,966	15,097	12,966	81,069	76,858	116,808
Mexico		1,827	1,407	9,564	21,018	12,706	1,754	1,382	9,858	18,991	12,752
Philippines		2,083	710	11,160	11,729	12,592	2,320	941	15,120	12,924	16,740
Hong Kong		14,532	3,170	34,457	28,397	47,881	19,036	4,567	49,260	38,930	65,970
Taiwan		2,427	959	11,848	4,320	15,107	3,352	1,461	15,103	5,184	18,995
Other Countries		8,375	5,025	45,113	48,929	53,305	11,404	7,127	68,347	68,461	78,463
Subtotal:----		42,218	20,536	169,454	168,617	233,558	52,964	28,443	238,756	221,346	309,727



## U.S. Exports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country Region	Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997		Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997
<b>Fresh Strawberries MT</b>											
European Union	970	515	3,114	2,687	3,622		2,100	1,070	7,966	6,643	9,212
Canada	2,855	2,148	38,501	34,337	39,978		3,837	3,221	54,771	54,004	57,300
Mexico	394	806	1,033	2,308	1,354		681	1,144	1,758	3,249	2,310
Thailand	73	0	252	0	288		120	0	451	0	511
Japan	1,251	1,092	5,684	5,105	6,858		4,828	3,561	21,314	18,052	26,262
Other Countries	48	24	459	898	514		114	46	1,312	1,839	1,414
Subtotal:----	5,591	4,586	49,043	45,334	52,615		11,680	9,041	87,571	83,787	97,010
<b>Fresh Oranges Inc Tmpl MT</b>											
Canada	3,854	5,923	193,447	199,164	198,847		2,045	2,768	99,393	100,565	102,434
Malaysia	353	860	21,232	19,686	21,343		181	413	11,629	10,560	11,689
Korea, Republic o	1,265	608	31,055	25,984	31,760		1,060	323	20,104	17,971	20,739
Hong Kong	8,837	8,446	125,382	163,462	133,150		5,413	4,091	71,037	98,294	75,655
Japan	3,770	5,361	122,797	124,689	123,521		2,429	4,202	68,535	74,153	69,023
Other Countries	3,455	4,823	79,036	86,705	81,807		1,884	2,450	42,095	47,685	43,663
Subtotal:----	21,534	26,021	572,949	619,691	590,428		13,013	14,247	312,793	349,229	323,203
<b>Fresh Grapefruit MT</b>											
European Union	0	0	137,795	136,919	140,246		0	0	59,690	54,094	60,956
Canada	2,145	1,955	70,801	51,166	74,982		994	1,290	27,285	26,903	29,244
Hong Kong	301	93	7,516	2,918	7,587		139	65	4,291	1,504	4,319
Taiwan	1,331	1,612	25,986	17,007	26,174		624	927	11,633	7,414	11,711
Japan	2,021	2,140	221,022	170,949	221,912		1,022	1,225	124,259	95,244	124,930
Other Countries	332	142	13,216	5,396	13,501		232	56	9,076	2,760	9,247
Subtotal:----	6,131	5,942	476,336	384,355	484,403		3,011	3,563	236,234	187,918	240,408
<b>Fresh Lemons MT</b>											
European Union	0	23	1,184	754	1,184		0	12	926	463	926
Canada	438	1,165	22,380	23,247	22,736		446	789	14,909	13,050	15,242
Korea, Republic o	254	171	3,712	2,091	3,877		328	172	3,551	1,575	3,810
Hong Kong	211	199	8,376	10,083	8,744		246	141	5,717	6,557	6,070
Japan	3,875	3,885	75,381	67,163	79,266		6,536	2,789	84,507	55,345	91,439
Other Countries	20	4	4,270	6,114	4,472		30	8	3,115	4,060	3,169
Subtotal:----	4,799	5,447	115,302	109,452	120,279		7,586	3,911	112,727	81,049	120,656
<b>Fresh Tang/Mand MT</b>											
European Union	0	0	2,024	956	2,024		0	0	1,382	585	1,382
Canada	0	0	13,204	13,444	13,361		0	0	10,896	10,172	11,025
Korea, Republic o	0	0	3,535	8,035	3,535		0	0	3,089	7,038	3,089
Japan	0	35	2,726	807	2,726		0	16	2,401	637	2,401
Australia	0	0	692	731	692		0	0	581	441	581
Other Countries	0	17	695	1,043	695		0	15	733	783	733
Subtotal:----	0	52	22,876	25,017	23,033		0	31	19,080	19,657	19,209
<b>Canned Peaches MT</b>											
Canada	421	573	4,405	7,599	4,954		395	555	4,803	7,209	5,297
Russian Federatio	9	0	1,169	285	1,278		8	0	971	221	1,068
Korea, Republic o	0	69	1,480	499	1,508		0	48	1,138	369	1,164
Taiwan	189	197	1,198	858	1,249		137	148	969	721	1,013
Japan	163	290	2,450	2,488	2,837		165	293	2,575	2,542	3,078
Other Countries	342	865	4,531	7,368	5,047		309	1,029	4,443	7,041	4,907
Subtotal:----	1,124	1,994	15,233	19,096	16,873		1,013	2,074	14,900	18,103	16,528
<b>Canned Pears MT</b>											
European Union	143	0	343	184	438		116	0	287	158	364
Canada	130	134	2,248	3,308	2,446		133	130	2,508	3,265	2,704
Mexico	14	0	91	0	91		11	0	27	0	27
Korea, Republic o	0	0	43	0	43		0	0	37	0	37
Japan	24	0	146	479	163		20	0	155	549	181
Other Countries	10	28	273	779	314		9	28	288	695	317
Subtotal:----	320	162	3,144	4,750	3,494		289	159	3,303	4,667	3,630
<b>Canned Pineapple MT</b>											
European Union	128	22	1,108	807	1,124		110	20	1,011	745	1,030
Canada	27	130	859	998	882		21	111	815	952	838
Philippines	42	42	186	469	218		35	35	155	391	181
Korea, Republic o	17	0	369	2	369		20	0	331	3	331
Japan	33	85	478	784	526		41	96	458	898	516
Other Countries	6	39	469	785	575		6	37	437	733	547
Subtotal:----	252	318	3,468	3,846	3,694		233	298	3,208	3,722	3,443
<b>Fruit Mixtures MT</b>											
Canada	559	626	6,740	7,651	7,713		571	746	7,460	8,629	8,453
Singapore	141	43	1,653	632	1,789		169	40	1,936	694	2,173
Philippines	15	31	1,415	969	1,419		38	36	1,718	1,146	1,729
Hong Kong	21	58	1,178	475	1,183		27	57	1,433	528	1,437
Japan	50	206	3,071	3,079	3,278		63	309	3,469	3,859	3,728
Other Countries	406	654	6,359	8,140	7,094		485	762	8,653	11,153	9,534
Subtotal:----	1,192	1,618	20,414	20,946	22,475		1,353	1,949	24,669	26,009	27,055

## U.S. Exports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country Region		Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997	Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997
<b>Dried Prunes MT</b>											
European Union		2,666	3,337	27,617	28,574	30,764	5,343	6,278	58,283	54,502	64,621
Canada		282	261	3,782	3,804	4,137	562	540	8,100	8,052	8,860
Netherlands Antil		125	3	2,039	2,111	2,199	312	11	5,146	3,801	5,552
Singapore		281	68	3,006	1,559	3,182	564	148	5,291	3,375	5,657
Japan		1,362	977	14,424	18,613	15,639	2,176	1,875	29,093	34,465	31,667
Other Countries		648	1,068	10,243	9,490	11,614	1,277	1,850	19,632	16,919	22,042
Subtotal:----		5,365	5,715	61,112	64,150	67,535	10,233	10,703	125,544	121,114	138,398
<b>Dried Raisins MT</b>											
European Union		5,033	6,258	41,685	48,431	47,432	9,392	10,375	73,238	80,355	83,689
Canada		1,366	1,097	10,081	10,348	11,436	2,538	1,892	19,928	19,517	22,589
Hong Kong		315	129	3,689	3,476	4,371	556	194	7,437	6,376	8,769
Taiwan		443	298	3,915	3,959	4,334	697	423	5,809	5,895	6,454
Japan		1,467	1,863	23,623	22,005	25,836	2,405	3,085	39,938	34,681	43,712
Other Countries		1,410	1,768	19,609	21,360	21,606	2,963	2,957	35,303	35,619	38,741
Subtotal:----		10,034	11,413	102,603	109,580	115,016	18,551	18,926	181,653	182,444	203,954
<b>Dried Figs MT</b>											
Canada		286	239	852	637	945	650	603	2,502	1,975	2,776
Mexico		0	0	24	17	41	0	0	75	44	119
China, Peoples Re		16	0	33	17	33	45	0	95	50	95
Hong Kong		34	18	492	276	567	169	63	1,785	1,177	2,071
Japan		20	20	339	482	363	72	61	1,101	1,323	1,193
Other Countries		11	0	76	133	80	28	0	217	333	229
Subtotal:----		367	276	1,815	1,563	2,027	964	726	5,775	4,901	6,483
<b>Dates MT</b>											
European Union		99	15	703	1,117	939	146	40	2,729	3,406	3,304
Canada		78	54	695	772	811	183	138	1,964	2,055	2,337
Switzerland		24	0	303	168	353	82	0	1,308	915	1,618
Indonesia		0	0	234	26	234	0	0	693	82	693
Australia		69	15	504	386	508	199	40	2,244	1,965	2,265
Other Countries		43	68	945	1,173	983	67	105	1,773	1,884	1,915
Subtotal:----		314	151	3,384	3,641	3,829	678	324	10,711	10,306	12,132
<b>Fcoj KL</b>											
European Union		38,169	5,443	187,777	145,791	205,417	13,485	2,345	74,523	57,645	80,212
Canada		1,769	1,677	21,256	19,882	22,939	2,730	2,596	34,032	29,089	36,575
Switzerland		82	0	54,032	32,137	54,032	41	0	10,500	8,411	10,500
Korea, Republic o		1,095	641	19,369	9,561	20,003	733	586	10,895	6,384	11,363
Japan		3,655	3,297	46,629	60,738	50,381	1,226	1,410	24,090	22,978	25,360
Other Countries		1,182	4,936	27,577	31,941	29,153	687	1,863	12,917	13,560	13,624
Subtotal:----		45,952	15,994	356,639	300,051	381,926	18,903	8,801	166,957	138,067	177,635
<b>Orange Juice MtCnc KL</b>											
European Union		2,746	7,650	26,680	58,148	29,297	1,548	3,698	17,271	26,552	18,968
Canada		10,603	12,359	116,573	128,971	127,249	7,039	8,525	80,218	87,632	87,612
Korea, Republic o		580	36	4,181	1,905	4,212	435	27	3,343	811	3,365
Hong Kong		192	68	3,002	491	3,209	158	54	2,668	362	2,821
Japan		303	198	2,144	4,635	2,524	227	157	1,662	3,484	1,913
Other Countries		1,192	2,227	11,430	12,007	12,431	997	1,740	9,330	9,695	10,194
Subtotal:----		15,617	22,538	164,009	206,157	178,921	10,403	14,201	114,491	128,537	124,874
<b>Grapefruit Juice Cnc KL</b>											
European Union		2,648	2,776	35,460	29,421	37,464	1,146	1,565	18,766	17,316	20,113
Canada		268	185	3,050	2,345	3,399	342	277	4,196	3,676	4,611
Mexico		0	99	497	561	497	0	96	389	469	389
Israel		0	0	602	0	602	0	0	170	0	170
Japan		2,207	955	16,228	11,949	17,137	974	805	13,371	9,128	13,908
Other Countries		526	62	2,960	2,358	3,378	404	39	2,062	1,121	2,301
Subtotal:----		5,649	4,077	58,796	46,635	62,477	2,866	2,782	38,954	31,710	41,493
<b>Fresh Asparagus MT</b>											
European Union		3	52	722	750	737	16	142	1,944	2,731	1,980
Canada		165	153	6,158	6,371	6,289	486	553	16,449	16,545	16,883
Mexico		0	0	53	89	53	0	0	125	139	125
Switzerland		0	0	1,423	2,549	1,423	0	0	4,468	6,628	4,468
Japan		385	75	6,352	5,195	6,431	2,320	402	26,148	17,724	26,529
Other Countries		18	1	220	327	226	46	7	690	973	703
Subtotal:----		570	281	14,928	15,281	15,160	2,867	1,104	49,824	44,741	50,688
<b>Fresh Broccoli MT</b>											
Canada		2,082	2,333	71,537	72,770	73,326	1,207	1,400	44,128	47,071	45,436
Mexico		57	146	584	638	634	45	79	495	505	558
Hong Kong		1,128	617	6,174	5,320	6,603	905	547	5,351	4,352	5,778
Taiwan		752	669	2,615	3,310	2,865	699	626	2,491	2,882	2,782
Japan		4,307	3,868	42,838	37,664	46,184	3,316	2,792	34,045	30,547	37,009
Other Countries		49	42	779	732	779	43	102	652	528	652
Subtotal:----		8,374	7,674	124,528	120,433	130,391	6,215	5,547	87,161	85,885	92,215

## U.S. Exports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country Region	Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997		Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997
<b>Fresh Carrots MT</b>											
Canada	3,399	3,786	85,072	95,448	87,276		2,009	2,234	40,898	49,055	42,416
Mexico	107	186	953	817	1,022		61	69	423	423	458
Trinidad and Tobago	48	30	1,014	788	1,014		14	13	455	338	455
United Arab Emira	419	315	3,062	3,725	3,368		142	128	1,101	1,372	1,227
Japan	198	78	1,260	1,243	1,342		176	88	1,323	1,110	1,363
Other Countries	675	540	5,470	6,169	6,000		341	259	2,906	3,129	3,168
Subtotal:----	4,845	4,936	96,831	108,190	100,022		2,743	2,791	47,106	55,428	49,087
<b>Fresh Lettuce MT</b>											
Canada	8,345	10,250	232,360	243,025	242,280		5,213	5,351	111,889	139,924	117,746
Mexico	3,119	3,367	16,512	16,336	19,251		1,227	1,237	6,558	6,543	7,571
Singapore	364	275	3,204	2,975	3,522		249	179	2,138	2,118	2,366
Hong Kong	3,251	1,484	17,223	14,982	18,490		1,957	848	10,003	9,171	10,905
Taiwan	718	537	3,001	2,605	3,496		459	333	1,751	1,580	2,101
Other Countries	413	533	7,011	6,704	7,442		348	558	5,629	5,839	5,922
Subtotal:----	16,210	16,446	279,312	286,628	294,482		9,452	8,506	137,968	165,175	146,612
<b>Fresh Onions MT</b>											
Canada	12,406	8,071	113,383	108,978	118,736		4,038	2,613	40,665	46,521	42,172
Mexico	2,129	1,850	12,448	20,712	15,570		851	699	5,284	7,858	6,444
Korea, Republic of	2	0	14,022	142	14,022		4	0	8,698	177	8,698
Taiwan	2,026	2,504	11,057	11,646	15,217		640	765	3,271	3,485	4,497
Japan	6,072	8,029	59,528	83,888	69,440		1,949	3,106	14,854	22,770	17,261
Other Countries	3,811	4,291	28,580	37,699	32,136		1,479	1,900	12,058	16,873	13,392
Subtotal:----	26,446	24,746	239,017	263,065	265,121		8,961	9,084	84,830	97,684	92,464
<b>Fresh Tomatoes MT</b>											
European Union	447	677	3,382	2,598	3,743		817	1,659	7,050	6,241	7,781
Canada	9,732	8,925	124,341	115,407	132,734		5,863	4,889	98,659	102,948	103,461
Mexico	9,460	972	12,926	4,956	15,867		6,532	669	9,215	4,391	11,491
Hong Kong	144	98	356	150	356		72	48	175	107	175
Japan	24	61	149	569	174		11	92	94	668	106
Other Countries	58	118	708	744	776		75	94	667	704	770
Subtotal:----	19,865	10,850	141,861	124,424	153,650		13,370	7,451	115,859	115,059	123,783
<b>Canned Sweet Corn MT</b>											
European Union	2,381	2,345	37,900	36,712	40,865		1,714	1,611	26,854	26,091	29,046
Korea, Republic of	668	1,379	16,363	11,244	18,282		674	1,323	16,506	11,208	18,331
Hong Kong	606	408	21,948	5,282	22,410		534	325	17,857	4,487	18,279
Taiwan	1,148	1,250	22,321	24,023	23,509		1,029	1,069	19,987	21,867	20,998
Japan	3,394	5,311	60,930	52,751	64,852		2,882	4,311	50,634	43,812	53,779
Other Countries	2,028	2,730	30,991	30,053	33,551		1,507	1,960	24,960	22,923	26,919
Subtotal:----	10,225	13,423	190,453	160,064	203,469		8,340	10,599	156,798	130,387	167,353
<b>Canned Tomato Paste MT</b>											
European Union	2,687	0	13,589	21,905	15,390		942	0	5,826	12,009	6,222
Canada	5,695	4,397	42,342	38,778	47,236		4,063	3,348	31,174	28,172	34,943
Brazil	0	0	27,396	2,944	27,396		0	0	17,915	1,904	17,915
Korea, Republic of	648	166	7,717	9,019	8,310		569	179	6,385	7,102	6,910
Japan	751	147	8,292	12,751	9,533		641	152	6,554	9,017	7,720
Other Countries	1,743	985	19,649	29,348	21,089		1,231	754	14,533	21,282	15,608
Subtotal:----	11,524	5,695	118,985	114,743	128,954		7,446	4,432	82,388	79,485	89,320
<b>Canned Tomato Sauce MT</b>											
European Union	397	397	4,711	6,299	4,999		569	542	6,077	8,259	6,459
Canada	4,893	6,622	53,906	66,586	59,272		4,502	5,773	49,937	58,750	54,848
Mexico	639	352	5,193	5,891	5,927		473	240	4,092	4,377	4,618
Korea, Republic of	131	151	1,339	1,518	1,688		145	127	1,278	1,287	1,569
Japan	438	754	5,175	5,661	5,749		432	628	5,820	5,285	6,442
Other Countries	1,209	959	9,607	11,063	10,474		1,280	1,044	9,969	11,841	11,011
Subtotal:----	7,707	9,234	79,931	97,019	88,108		7,403	8,354	77,174	89,799	84,947
<b>Frozen French Fries MT</b>											
Philippines	1,890	1,465	16,930	16,372	18,645		1,404	972	12,188	11,437	13,390
Korea, Republic of	1,764	2,362	26,304	22,461	28,494		1,273	1,461	19,480	14,154	21,023
Hong Kong	2,184	3,145	24,715	27,203	27,293		1,456	2,037	16,528	17,926	18,247
Taiwan	1,631	1,791	19,476	22,059	21,128		1,072	1,162	13,038	14,400	14,121
Japan	16,789	20,516	186,557	213,254	200,342		12,431	14,936	138,046	149,297	147,601
Other Countries	9,799	8,599	92,142	101,238	100,773		7,987	6,848	73,250	79,283	79,954
Subtotal:----	34,057	37,877	366,124	402,587	396,674		25,623	27,416	272,530	286,496	294,335
<b>Frozen Sweet Corn MT</b>											
European Union	92	204	2,142	4,428	2,816		55	163	1,539	3,171	1,926
Canada	273	461	4,444	2,745	4,690		212	291	3,363	1,959	3,542
Mexico	302	134	1,116	3,037	2,114		155	71	593	1,731	983
Hong Kong	211	329	4,641	5,034	5,142		150	213	3,319	3,644	3,703
Japan	3,095	3,227	37,243	42,980	40,865		3,157	2,951	34,758	37,503	38,092
Other Countries	742	1,330	8,813	12,991	9,574		503	884	7,341	10,006	7,965
Subtotal:----	4,714	5,684	58,398	71,215	65,202		4,232	4,574	50,914	58,013	56,212

## U.S. Exports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country Region	Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997		Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997
<b>Almonds Unshelled MT</b>											
European Union	428	652	5,132	6,625	6,043		1,007	1,609	12,200	15,959	14,259
India	2,744	1,816	8,267	11,053	13,609		6,895	5,463	20,346	34,107	36,783
Hong Kong	0	0	593	487	666		0	0	1,489	1,245	1,665
Taiwan	0	0	521	235	541		0	0	1,276	748	1,347
Japan	40	68	973	2,725	1,136		98	151	2,423	6,815	2,820
Other Countries	127	151	2,140	3,422	2,740		309	360	5,143	7,799	6,785
Subtotal:----	3,340	2,687	17,625	24,548	24,735		8,309	7,583	42,877	66,672	63,658
<b>Almonds Shelled/Prep MT</b>											
European Union	8,787	13,636	86,184	102,868	105,022		41,518	56,234	440,043	401,461	519,178
Canada	684	774	7,262	8,201	8,421		3,320	2,946	35,292	32,072	40,499
Mexico	320	385	3,303	3,830	3,944		845	820	8,748	8,414	10,276
Switzerland	108	203	2,829	2,242	3,317		592	986	16,153	9,431	18,549
Japan	772	1,392	14,978	18,739	16,483		4,511	6,471	87,287	79,235	95,101
Other Countries	1,352	1,829	19,038	26,995	26,389		5,954	8,054	99,774	113,092	132,484
Subtotal:----	12,023	18,219	133,594	162,875	163,576		56,742	75,512	687,297	643,705	816,088
<b>Walnuts, Shelled MT</b>											
European Union	105	323	4,253	5,845	4,444		251	1,253	10,172	13,971	11,119
Canada	216	236	2,807	2,179	3,131		713	795	7,915	7,880	8,869
Brazil	4	0	1,319	367	1,319		14	0	2,036	766	2,036
Israel	91	136	1,125	2,255	1,309		514	504	5,530	8,251	6,136
Japan	722	453	9,430	6,253	10,218		1,881	1,982	31,107	28,059	32,570
Other Countries	331	181	3,302	4,678	3,515		1,026	686	12,110	12,640	12,746
Subtotal:----	1,469	1,329	22,237	21,577	23,936		4,399	5,220	68,870	71,567	73,476
<b>Walnuts, Unshelled MT</b>											
European Union	87	268	41,470	28,379	48,664		109	530	89,221	54,760	104,206
Canada	54	86	1,450	1,670	1,476		104	165	3,414	3,272	3,478
Brazil	0	0	1,698	877	1,698		0	0	3,750	1,848	3,750
Israel	0	45	1,325	1,071	1,344		0	71	2,424	1,865	2,464
Japan	0	57	897	684	938		0	90	1,523	1,130	1,591
Other Countries	21	76	2,707	6,900	3,068		35	141	5,446	11,866	6,269
Subtotal:----	162	532	49,548	39,582	57,187		248	997	105,778	74,741	121,757
<b>Pistachios MT</b>											
European Union	410	1,337	3,787	14,260	4,328		1,455	5,517	14,317	58,379	16,524
Canada	102	152	1,566	2,224	1,768		488	622	7,028	9,929	7,874
Singapore	12	0	692	489	730		55	0	3,252	2,288	3,426
Hong Kong	397	268	5,370	10,039	6,164		1,777	1,040	23,522	39,192	27,211
Japan	37	54	1,041	632	1,267		177	243	5,340	2,992	6,546
Other Countries	452	124	4,099	5,155	4,593		2,456	551	21,285	24,657	23,741
Subtotal:----	1,410	1,935	16,555	32,799	18,851		6,408	7,973	74,744	137,437	85,322
<b>Hop Pellets MT</b>											
European Union	0	25	1,018	1,201	1,080		0	179	6,484	6,360	6,810
Canada	211	111	1,505	1,324	1,631		1,214	727	9,925	7,890	10,643
Colombia	0	0	303	423	323		0	0	2,759	3,501	2,956
Brazil	12	51	1,824	791	1,830		40	176	7,717	3,343	7,765
Japan	0	0	239	337	239		0	0	870	1,628	870
Other Countries	28	66	974	1,222	1,017		72	239	4,485	4,987	4,691
Subtotal:----	251	253	5,863	5,297	6,120		1,327	1,320	32,240	27,710	33,737
<b>Hop Extract MT</b>											
European Union	68	68	1,160	999	1,229		982	901	17,481	14,453	18,313
Mexico	21	17	457	583	643		410	242	10,594	12,843	12,219
Brazil	33	58	452	330	529		886	1,200	7,211	5,438	9,274
Argentina	0	-	160	58	168		0	5	1,404	1,232	1,612
Hong Kong	13	15	114	154	127		168	193	1,280	1,926	1,373
Other Countries	25	38	697	902	772		469	503	12,990	12,868	14,289
Subtotal:----	159	197	3,040	3,025	3,468		2,916	3,044	50,960	48,760	57,080
<b>Hops, Nspf MT</b>											
European Union	19	0	1,153	1,127	1,202		77	0	5,176	4,769	5,413
Mexico	0	0	73	155	73		0	0	423	1,078	423
Brazil	0	4	113	23	113		5	23	454	629	454
Philippines	0	0	41	0	41		0	0	713	0	713
Japan	0	1	276	47	276		0	11	1,164	605	1,164
Other Countries	33	15	171	230	183		132	53	1,110	1,416	1,477
Subtotal:----	53	21	1,826	1,582	1,888		214	86	9,040	8,497	9,644
<b>Grape Wine KL</b>											
European Union	9,286	12,521	79,193	101,693	89,715		20,154	26,857	162,034	211,763	184,575
Canada	2,438	3,398	31,929	36,393	34,618		4,932	6,219	66,354	72,608	72,909
Switzerland	820	800	7,052	11,333	8,760		1,645	1,566	12,689	22,486	15,339
Hong Kong	448	376	6,545	4,461	6,896		757	955	10,332	7,977	10,908
Japan	2,162	2,676	19,595	45,884	20,691		2,857	4,790	29,639	82,191	31,573
Other Countries	2,228	2,083	31,026	28,282	33,719		3,629	3,319	48,356	45,305	52,856
Subtotal:----	17,382	21,853	175,341	228,045	194,399		33,974	43,706	329,404	442,330	368,160

## U.S. Exports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country	Aug	Aug	Oct-Aug	Oct-Aug	Oct-Sep	Aug	Aug	Oct-Aug	Oct-Aug	Oct-Sep	
Region	FY 1997	FY 1998	FY 1997	FY 1998	FY 1997	FY 1997	FY 1998	FY 1997	FY 1998	FY 1997	
Essential Oils	MT										
European Union	968	1,191	11,476	12,900	12,637	13,246	13,288	161,367	173,220	176,375	
Canada	539	572	7,031	6,203	7,521	7,621	8,135	90,021	87,416	96,992	
Mexico	212	229	4,791	5,647	4,992	4,267	4,125	34,749	38,184	37,476	
Hong Kong	59	161	2,077	2,379	2,167	1,013	2,361	24,218	20,862	25,592	
Japan	331	325	3,925	3,368	4,253	3,886	4,500	126,167	44,884	138,718	
Other Countries	1,493	937	13,592	11,752	14,696	11,771	11,373	132,550	124,876	144,235	
Subtotal:----	3,603	3,415	42,892	42,248	46,266	41,804	43,782	569,071	489,441	619,388	
Potato Chips	MT										
European Union	352	393	3,743	4,412	4,280	916	959	14,540	10,528	15,850	
Canada	1,561	1,859	12,119	17,346	13,507	4,072	3,751	31,543	37,531	35,399	
Mexico	546	3,608	7,154	15,202	7,926	1,059	3,662	12,931	22,771	14,271	
Taiwan	192	294	1,991	3,777	2,230	489	605	5,374	8,435	5,914	
Japan	739	1,424	9,446	11,437	10,367	2,096	4,095	25,178	29,951	27,881	
Other Countries	925	2,786	14,379	39,213	15,289	2,785	6,975	43,216	93,059	46,136	
Subtotal:----	4,314	10,364	48,833	91,386	53,599	11,417	20,047	132,781	202,275	145,451	



## U.S. Imports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country Region		Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997	Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997
Fresh Apples	MT										
Canada		1,500	1,785	66,059	50,744	72,932	683	1,108	25,027	18,750	27,000
Chile		39	1,275	26,611	37,066	26,611	17	689	14,386	16,959	14,386
New Zealand		9,655	1,660	52,508	41,649	52,508	6,302	1,037	33,322	27,133	33,322
Other Countries		2,096	5,125	16,514	21,880	16,514	852	2,830	8,028	11,860	8,028
Subtotal:----		13,289	9,845	161,692	151,338	168,564	7,854	5,665	80,762	74,703	82,736
Fresh Pears	MT										
Chile		0	0	37,216	23,091	37,216	0	0	18,537	10,644	18,537
Argentina		0	0	31,230	33,636	31,230	0	0	21,123	23,187	21,123
New Zealand		0	0	3,907	3,837	3,907	0	0	3,315	4,145	3,315
Other Countries		5	73	5,876	6,741	6,168	10	58	7,065	7,816	7,330
Subtotal:----		5	73	78,229	67,305	78,521	10	58	50,041	45,792	50,306
Fresh Apricots	MT										
Chile		0	0	1,011	679	1,011	0	0	1,146	1,005	1,146
Turkey		0	0	0	1	18	0	0	0	4	44
New Zealand		0	0	245	170	245	0	0	656	568	656
Other Countries		10	0	39	2	39	13	0	118	9	118
Subtotal:----		10	0	1,295	852	1,313	13	0	1,920	1,586	1,964
Fresh Peach/Nect	MT										
Canada		60	149	79	160	333	67	153	83	164	316
Mexico		0	0	62	0	62	0	0	60	0	60
Chile		0	0	41,216	6,756	41,216	0	0	32,464	6,427	32,464
Other Countries		0	0	60	14	60	0	0	61	11	61
Subtotal:----		60	149	41,418	6,931	41,672	67	153	32,668	6,602	32,901
Fr. Plums/Prunes	MT										
Leeward-Windward		16	23	69	100	92	19	29	75	100	98
Chile		0	0	22,684	19,246	22,684	0	0	20,724	17,512	20,724
South Africa, Rep		0	0	53	97	53	0	0	55	27	55
Other Countries		35	0	91	44	94	63	0	141	77	145
Subtotal:----		51	23	22,897	19,487	22,923	82	29	20,996	17,715	21,023
Fresh Grapes	MT										
Mexico		0	0	75,701	101,032	75,713	0	0	95,439	144,260	95,442
Chile		0	0	264,609	301,516	264,609	0	0	280,190	279,145	280,190
South Africa, Rep		0	0	7,437	10,135	7,437	0	0	8,676	13,538	8,676
Other Countries		33	506	2,852	4,196	3,808	44	119	1,517	2,694	1,875
Subtotal:----		33	506	350,599	416,878	351,567	44	119	385,822	439,636	386,183
Raspberries	MT										
Canada		54	38	4,164	2,944	4,206	43	43	5,803	3,269	5,860
Mexico		0	0	266	471	266	0	0	2,327	2,460	2,327
Chile		39	40	1,387	959	1,387	38	95	3,017	1,420	3,017
Other Countries		0	0	199	61	199	2	0	449	220	451
Subtotal:----		94	78	6,016	4,435	6,059	83	138	11,597	7,369	11,655
Fresh Strawberries	MT										
Canada		9	13	81	68	88	29	45	164	142	186
Mexico		0	0	14,459	25,129	14,459	0	0	24,496	63,426	24,496
New Zealand		0	0	544	573	544	0	0	1,926	1,989	1,926
Other Countries		0	0	111	81	111	0	0	237	241	237
Subtotal:----		9	13	15,196	25,851	15,203	29	45	26,822	65,798	26,844
Fresh Avocados	MT										
Mexico		159	128	1,677	7,674	1,841	151	117	1,643	10,546	1,791
Dominican Republi		135	107	7,120	5,506	7,405	99	87	5,082	4,440	5,277
Chile		1,054	5,090	13,423	14,848	17,748	1,115	4,977	13,719	15,310	18,203
Other Countries		41	0	515	593	674	28	0	617	1,118	721
Subtotal:----		1,390	5,325	22,736	28,620	27,667	1,392	5,182	21,060	31,413	25,993
Bananas	MT										
Honduras		59,402	27,606	495,537	476,006	547,556	15,494	7,343	131,030	125,828	143,174
Costa Rica		65,976	123,327	893,328	911,671	983,120	20,547	36,097	287,694	258,392	312,764
Ecuador		80,570	89,563	802,668	953,433	863,439	24,844	26,086	246,676	281,030	265,046
Other Countries		110,309	121,622	1,214,078	1,294,244	1,333,792	31,550	35,945	368,374	351,577	401,763
Subtotal:----		316,257	362,118	3,405,611	3,635,354	3,727,906	92,436	105,471	1,033,773	1,016,827	1,122,747
Mangoes	MT										
Mexico		18,059	15,773	155,138	159,731	157,870	6,948	9,795	95,856	101,968	97,063
Guatemala		0	0	6,766	10,233	6,766	0	0	2,851	4,489	2,851
Haiti		975	340	10,348	7,184	10,607	634	334	7,028	5,452	7,186
Other Countries		6	0	15,450	9,000	15,872	9	0	15,429	11,121	15,909
Subtotal:----		19,040	16,113	187,702	186,148	191,115	7,592	10,129	121,163	123,030	123,009
Pineapple	MT										
Mexico		1,354	363	12,287	19,220	13,055	398	117	3,483	5,458	3,721
Honduras		1,669	2,318	20,856	25,682	22,504	481	670	5,974	7,347	6,459
Costa Rica		11,232	18,726	106,443	180,714	124,262	3,820	6,018	49,059	56,477	56,057
Other Countries		906	606	10,740	7,275	11,433	670	629	7,641	6,089	8,204
Subtotal:----		15,161	22,014	150,325	232,891	171,253	5,369	7,435	66,158	75,370	74,441

# U.S. Imports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country Region	Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997	Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997	
Cantaloupe	MT										
Mexico	765	0	144,954	155,753	146,007	166	0	57,238	56,978	57,502	
Guatemala	0	0	66,739	78,855	66,739	0	0	21,621	22,883	21,621	
Honduras	0	0	92,458	100,019	92,458	0	0	16,626	22,576	16,626	
Other Countries	8	0	90,892	108,777	90,899	3	0	34,620	26,377	34,627	
Subtotal:----	773	0	395,043	443,404	396,103	169	0	130,105	128,814	130,376	
Other Melons	MT										
Mexico	0	59	275,102	292,677	275,579	0	52	62,023	82,686	62,073	
Honduras	0	0	32,643	29,468	32,643	0	0	5,829	7,748	5,829	
Costa Rica	0	0	27,345	39,963	27,345	0	0	10,627	12,099	10,627	
Other Countries	3	10	47,283	54,874	47,336	4	14	17,568	19,536	17,597	
Subtotal:----	3	69	382,373	416,982	382,903	4	66	96,047	122,069	96,126	
Fr. Orng Inc Impl	MT										
Mexico	0	0	10,288	8,030	10,288	0	0	4,415	2,936	4,415	
Dominican Republi	455	419	2,750	1,666	3,155	208	157	1,032	576	1,249	
Australia	12,303	13,485	15,117	25,484	15,127	16,563	15,964	20,571	30,073	20,583	
Other Countries	7	30	1,083	3,864	1,083	12	10	506	2,433	510	
Subtotal:----	12,766	13,934	29,237	39,045	29,653	16,783	16,131	26,524	36,017	26,756	
Canned Mandarins	MT										
European Union	1,128	2,898	22,037	26,538	23,398	1,135	2,390	22,155	19,983	23,464	
Mexico	188	57	1,446	1,440	1,686	195	57	1,515	1,561	1,789	
China, Peoples Re	3,109	3,569	28,396	32,965	30,572	2,724	2,704	26,654	26,582	28,581	
Other Countries	46	77	596	705	634	80	115	888	1,067	949	
Subtotal:----	4,472	6,601	52,475	61,648	56,289	4,134	5,266	51,212	49,192	54,784	
Canned Black Olive	MIXEO										
Mexico	3,098,450	4,423,600	3,803,000	5,496,121	6,112,150	1,481	2,110	1,820	2,780	3,156	
Israel	65,900	33,600	193,880	162,263	193,880	108	81	367	329	367	
Morocco	17,055	67,030	211,232	315,103	211,232	25	79	279	381	279	
Other Countries	27,963	26,722	235,227	498,056	235,227	68	60	588	1,019	588	
Subtotal:----	3,209,368	4,550,952	4,443,339	6,471,543	6,752,489	1,682	2,329	3,055	4,510	4,390	
Canned Green Olive	MIXEO										
European Union	5,838,492	5,883,638	56,368,201	65,485,797	60,353,438	14,236	12,613	143,953	143,977	153,846	
Turkey	142,902	42,928	1,812,067	1,199,548	1,937,911	207	54	2,635	1,698	2,810	
Morocco	1,391,938	1,247,744	11,032,167	9,246,748	11,438,714	2,618	2,163	20,330	15,941	21,052	
Other Countries	72,304	93,170	937,402	1,058,437	1,033,607	126	156	1,959	1,958	2,153	
Subtotal:----	7,445,636	7,267,480	70,149,837	76,990,530	74,763,670	17,187	14,986	168,877	163,574	179,860	
Canned Peaches	MT										
European Union	1,496	614	22,544	11,915	24,296	934	504	14,920	7,985	16,031	
Chile	75	5	1,254	8	1,254	55	5	895	9	895	
South Africa, Rep	282	263	3,322	2,552	3,457	222	158	2,316	1,782	2,413	
Other Countries	2	97	476	2,131	476	6	167	370	1,900	370	
Subtotal:----	1,856	979	27,596	16,607	29,483	1,218	834	18,502	11,675	19,709	
Canned Pineapple	MT										
Thailand	8,358	1,879	69,135	48,612	76,059	5,689	1,413	46,414	33,984	51,135	
Indonesia	8,399	3,219	56,294	49,766	63,076	6,586	2,501	43,962	38,259	49,351	
Philippines	8,793	10,574	111,313	108,168	124,332	5,746	7,210	73,621	77,840	82,478	
Other Countries	2,857	3,032	27,665	30,636	30,946	2,153	2,264	21,194	22,359	23,654	
Subtotal:----	28,408	18,704	264,407	237,181	294,413	20,174	13,388	185,191	172,442	206,618	
Oried Apricots	MT										
Turkey	744	384	9,194	11,032	10,599	2,051	891	25,848	28,726	29,450	
China, Peoples Re	0	1	292	109	293	0	3	602	259	605	
Australia	2	9	134	102	137	15	58	498	386	516	
Other Countries	0	0	208	134	209	0	0	485	447	487	
Subtotal:----	746	394	9,829	11,376	11,237	2,066	952	27,433	29,817	31,058	
Dates	MT										
Mexico	0	0	85	91	148	0	0	125	138	231	
Pakistan	1	133	1,937	2,471	1,937	2	124	1,778	2,341	1,778	
China, Peoples Re	4	18	330	334	341	7	29	600	569	620	
Other Countries	0	0	152	235	162	0	0	452	551	479	
Subtotal:----	5	151	2,503	3,132	2,587	9	153	2,956	3,598	3,107	
Oried Figs	MT										
European Union	0	0	885	549	924	0	0	2,040	1,372	2,151	
Mexico	79	91	322	171	395	182	183	790	282	959	
Turkey	0	0	381	405	381	0	0	872	862	872	
Other Countries	0	0	35	19	36	0	0	75	55	77	
Subtotal:----	79	91	1,623	1,144	1,736	182	183	3,777	2,571	4,059	
Oried Raisins	MT										
Mexico	1,279	759	4,254	5,301	5,045	1,354	841	4,108	5,401	4,860	
Chile	530	355	3,331	1,825	3,482	785	501	4,597	2,532	4,824	
South Africa, Rep	112	0	1,132	935	1,165	175	0	1,449	1,327	1,505	
Other Countries	99	102	1,695	1,334	1,715	91	105	1,971	1,486	2,002	
Subtotal:----	2,020	1,215	10,412	9,395	11,407	2,406	1,448	12,125	10,747	13,190	

## U.S. Imports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country Region		Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997	Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997
Apple Juice	KL										
European Union		3,580	16,974	323,225	185,116	327,597	1,358	4,100	118,552	53,991	120,190
Argentina		37,816	32,163	255,004	307,126	259,968	9,531	5,751	64,478	61,808	65,864
Hungary		56	3	140,373	99,042	140,388	54	2	44,579	19,493	44,610
Other Countries		22,853	26,633	329,306	343,938	357,033	7,839	5,198	115,503	78,784	123,967
Subtotal:----		64,305	75,773	1,047,908	935,221	1,084,986	18,782	15,051	343,111	214,076	354,632
Fcoj	KL										
Mexico		17,905	24,953	167,968	231,075	188,382	3,721	6,734	38,990	54,964	43,267
Costa Rica		7,475	9,055	65,521	71,016	72,772	1,743	2,519	15,143	16,854	16,720
Brazil		57,387	48,972	688,854	634,787	731,512	8,982	9,586	141,872	105,507	148,961
Other Countries		3,101	1,327	104,430	50,929	107,210	704	423	23,537	12,657	24,130
Subtotal:----		85,869	84,307	1,026,773	987,807	1,099,876	15,150	19,262	219,541	189,982	233,077
Grape Juice	KL										
Mexico		2,372	874	20,223	10,469	21,889	1,072	558	9,193	5,426	9,889
Brazil		2,379	308	19,687	11,012	21,816	1,168	136	8,413	5,306	9,341
Argentina		32,806	2,988	146,341	75,697	163,836	11,315	1,177	48,765	26,594	54,839
Other Countries		2,329	1,436	34,229	25,277	35,748	1,409	957	20,156	17,297	20,982
Subtotal:----		39,887	5,606	220,480	122,455	243,290	14,964	2,829	86,527	54,624	95,051
Pineapple Juice, Con	KL										
Thailand		5,612	2,654	80,248	54,705	84,785	1,988	787	25,737	16,820	27,316
Indonesia		2,778	1,030	27,148	21,362	31,965	860	285	8,325	6,314	9,782
Philippines		11,395	8,190	93,098	80,430	104,714	2,468	1,685	19,181	18,871	21,680
Other Countries		1,418	1,501	24,137	18,408	25,565	419	570	8,563	5,789	8,994
Subtotal:----		21,202	13,376	224,631	174,905	247,028	5,734	3,327	61,806	47,795	67,773
Frozen Strawberries	MT										
Canada		11	28	148	319	184	28	65	284	744	372
Mexico		402	358	21,715	17,842	22,049	344	357	18,642	18,985	19,156
China, Peoples Re		0	162	22	240	22	22	219	45	427	45
Other Countries		1	11	24	56	24	36	51	632	1,047	634
Subtotal:----		414	559	21,909	18,457	22,279	430	693	19,603	21,203	20,207
Fresh Beans	MT										
Canada		703	530	1,499	903	1,631	447	412	901	694	950
Mexico		42	33	18,171	16,660	18,182	31	30	22,312	18,821	22,316
Guatemala		3	18	140	225	140	4	15	120	194	120
Other Countries		5	0	142	194	198	8	0	204	257	263
Subtotal:----		752	581	19,952	17,981	20,150	491	456	23,536	19,967	23,648
Fresh Carrots	MT										
Canada		4,248	4,582	54,692	64,289	63,557	1,552	1,523	14,037	17,328	16,112
Mexico		3,086	1,615	34,721	21,498	35,613	542	309	5,903	4,416	6,073
Israel		0	0	96	0	96	0	0	73	0	73
Other Countries		13	0	204	178	204	15	0	95	128	95
Subtotal:----		7,348	6,197	89,713	85,965	99,470	2,109	1,832	20,108	21,871	22,353
Fresh Cabbage	MT										
Canada		2,524	2,864	19,049	31,287	21,419	543	984	4,004	9,341	4,514
Mexico		591	832	7,133	14,195	7,855	129	201	1,280	3,263	1,372
Costa Rica		0	0	23	0	23	0	0	13	0	13
Other Countries		5	0	26	951	26	2	0	34	355	34
Subtotal:----		3,121	3,696	26,231	46,433	29,323	675	1,185	5,330	12,959	5,932
Fresh Celery	MT										
Canada		1,163	579	2,342	1,867	4,300	478	164	867	599	1,508
Mexico		14	52	23,321	41,023	23,321	3	20	6,047	10,061	6,047
Dominican Republi		5	0	117	142	121	2	0	73	130	77
Other Countries		5	7	72	68	78	13	24	153	143	163
Subtotal:----		1,187	638	25,852	43,101	27,820	495	208	7,140	10,933	7,796
Fresh Cucumbers	MT										
Canada		2,105	4,393	8,578	11,432	9,960	1,349	2,037	8,402	10,591	9,533
Mexico		3,458	5,020	281,864	303,283	285,254	1,667	2,377	86,729	137,965	88,569
Honduras		0	0	4,805	4,857	4,805	0	0	916	1,114	916
Other Countries		45	115	2,249	2,622	2,286	57	142	1,753	1,585	1,805
Subtotal:----		5,608	9,527	297,496	322,194	302,306	3,073	4,556	97,801	151,255	100,823
Fresh Cauliflower	MT										
Canada		3,061	2,311	4,491	7,390	9,222	1,312	1,022	1,999	3,393	4,144
Mexico		50	0	873	6,795	1,559	17	0	286	2,451	503
Guatemala		13	0	13	0	28	15	0	15	0	30
Other Countries		0	67	2	67	40	0	65	3	65	29
Subtotal:----		3,124	2,378	5,379	14,252	10,849	1,344	1,087	2,302	5,909	4,707
Fresh Garlic	MT										
European Union		175	294	934	883	1,080	263	552	1,641	1,614	1,896
Mexico		350	1,441	12,347	19,750	12,537	443	1,573	12,806	22,079	13,057
Argentina		0	0	2,115	6,169	2,115	0	0	3,177	8,022	3,177
Other Countries		28	331	1,782	2,299	1,838	46	320	2,489	2,871	2,531
Subtotal:----		553	2,066	17,178	29,101	17,570	752	2,446	20,112	34,585	20,661

# U.S. Imports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country Region	Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997	Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997	
Onions, Exc Seed	MT										
Canada	445	3,512	20,391	28,621	22,717	220	1,598	5,828	8,945	6,644	
Mexico	4,260	4,143	209,455	203,306	213,277	4,054	2,644	105,028	125,390	108,813	
Peru	0	0	10,553	3,765	10,553	0	0	3,582	2,309	3,582	
Other Countries	555	892	12,697	10,968	13,438	392	692	7,009	9,373	7,484	
Subtotal:----	5,259	8,547	253,096	246,660	259,984	4,666	4,934	121,447	146,018	126,523	
Fresh Peppers	MT										
European Union	2,367	2,575	16,959	20,576	18,787	4,563	5,306	38,987	51,206	42,222	
Canada	2,273	2,652	6,451	9,318	10,131	2,919	4,157	13,882	24,314	16,762	
Mexico	13,576	16,335	234,544	255,328	251,474	4,745	10,244	180,676	237,936	186,686	
Other Countries	122	219	3,794	6,906	3,829	123	84	6,168	9,327	6,238	
Subtotal:----	18,338	21,781	261,748	292,128	284,221	12,349	19,791	239,713	322,784	251,908	
Seed Potatoes	MT										
Canada	86	19	113,970	143,996	114,218	22	7	20,146	28,469	20,189	
Brazil	0	0	3	44	3	0	0	3	43	3	
China, Peoples Re	8	0	11	0	11	6	0	8	0	8	
Other Countries	0	0	0	24	0	0	0	0	14	5	
Subtotal:----	94	19	113,984	144,064	114,233	28	7	20,157	28,526	20,204	
Table Potatoes	MT										
European Union	0	0	44	36	62	0	0	43	25	56	
Canada	7,268	7,739	188,227	310,463	210,604	1,473	1,560	34,442	62,464	38,993	
Japan	2	0	13	55	13	5	0	38	67	38	
Other Countries	0	0	12	158	12	0	0	9	222	9	
Subtotal:----	7,270	7,739	188,296	310,713	210,692	1,477	1,560	34,532	62,779	39,097	
Fresh Tomatoes	MT										
European Union	4,224	3,881	35,709	41,307	38,267	5,172	5,477	57,687	68,530	61,384	
Canada	4,752	7,251	30,982	51,109	34,920	6,584	10,554	50,015	81,625	55,045	
Mexico	21,609	31,477	645,413	725,316	666,748	14,616	21,460	475,638	546,009	488,503	
Other Countries	0	2	3,270	4,728	3,270	0	4	6,681	8,316	6,681	
Subtotal:----	30,585	42,611	715,373	822,460	743,205	26,372	37,495	590,021	704,480	611,612	
Fresh Asparagus	MT										
Mexico	1,985	1,901	20,444	27,439	20,970	2,857	2,597	37,217	54,594	37,985	
Peru	1,712	1,149	9,565	9,622	12,002	2,977	2,065	15,990	17,233	20,530	
Chile	0	0	2,268	2,505	2,581	0	0	1,980	2,421	2,305	
Other Countries	257	253	3,088	3,460	3,193	435	414	5,575	6,879	5,769	
Subtotal:----	3,954	3,303	35,365	43,026	38,745	6,268	5,076	60,762	81,127	66,588	
Canned Tomato Paste	MT										
Mexico	0	0	7,350	8,350	7,350	0	0	5,290	4,556	5,290	
Peru	0	0	654	0	654	0	0	543	0	543	
Israel	252	0	3,468	636	3,524	208	0	3,028	528	3,065	
Other Countries	120	0	2,127	979	2,167	166	0	2,055	1,047	2,095	
Subtotal:----	372	0	13,598	9,965	13,694	374	0	10,915	6,131	10,993	
Canned Tomato Sauce	MT										
European Union	375	431	7,683	5,008	9,222	799	626	14,972	10,268	15,934	
Canada	217	630	5,298	5,305	5,655	270	493	4,900	4,256	5,352	
Dominican Republi	99	60	1,783	1,078	1,986	74	45	1,331	788	1,465	
Other Countries	196	11	2,948	2,299	3,102	449	12	7,221	5,192	7,613	
Subtotal:----	888	1,131	17,712	13,691	19,965	1,592	1,176	28,424	20,505	30,364	
Canned Tomatoes	MT										
European Union	2,611	2,392	44,600	49,366	48,631	937	1,126	17,570	23,605	19,156	
Canada	520	662	6,661	5,795	7,096	251	328	3,230	3,010	3,450	
Israel	537	2,791	5,170	8,330	6,418	342	1,972	2,937	5,407	3,653	
Other Countries	388	210	3,249	2,584	3,444	177	134	1,627	1,457	1,720	
Subtotal:----	4,055	6,055	59,680	66,074	65,589	1,707	3,560	25,363	33,479	27,979	
Canned Mushrooms	MT										
India	486	456	3,307	4,932	3,571	808	843	5,961	8,480	6,467	
Indonesia	1,156	1,112	14,878	12,638	16,192	2,464	2,231	31,281	23,965	34,027	
China, Peoples Re	2,378	180	32,289	28,602	34,448	3,649	294	47,162	38,825	50,298	
Other Countries	1,122	930	12,262	12,923	13,047	2,257	1,886	25,551	27,820	27,532	
Subtotal:----	5,142	2,677	62,735	59,096	67,258	9,177	5,254	109,956	99,090	118,324	
Frozen Broccoli	MT										
Canada	0	45	160	324	172	0	50	149	345	157	
Mexico	8,472	8,018	136,315	121,472	148,645	5,240	5,552	83,387	78,153	91,092	
Guatemala	2,821	4,246	17,682	20,040	20,617	2,123	3,414	12,670	14,560	14,806	
Other Countries	0	0	24	49	24	0	0	25	22	25	
Subtotal:----	11,293	12,309	154,181	141,885	169,458	7,364	9,015	96,231	93,080	106,080	
Frozen Cauliflower	MT										
Canada	70	6	709	362	749	58	7	578	367	609	
Mexico	377	819	15,469	20,313	16,424	284	649	11,553	14,789	12,283	
Guatemala	122	103	897	1,262	1,284	107	80	701	1,045	1,022	
Other Countries	51	23	197	505	272	15	13	111	231	147	
Subtotal:----	620	951	17,271	22,442	18,729	465	750	12,943	16,431	14,060	

## U.S. Imports of Selected Horticultural Products

Product and Country		Quantity					Values (1000 Dollars)				
Country Region		Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997	Aug FY 1997	Aug FY 1998	Oct-Aug FY 1997	Oct-Aug FY 1998	Oct-Sep FY 1997
Frozen Potatoes	MT										
European Union		19	107	481	1,430	582	8	57	306	849	375
Canada		20,038	22,342	264,512	343,897	286,083	11,490	13,546	155,867	213,009	168,663
New Zealand		71	0	71	0	71	86	0	86	0	86
Other Countries		4	2	67	1,549	72	17	6	180	340	199
Subtotal:----		20,132	22,450	265,131	346,876	286,808	11,602	13,609	156,439	214,198	169,323
Pistachios, Nsh	MT										
Turkey		48	0	486	73	516	195	0	1,840	281	1,942
Singapore		0	0	1	0	1	0	0	7	0	7
Hong Kong		0	0	0	0	0	0	0	2	0	2
Other Countries		0	3	0	16	0	0	12	1	51	1
Subtotal:----		48	3	487	89	517	195	12	1,850	332	1,952
Cashew Nut	MT										
Brazil		2,062	2,275	24,140	23,354	25,908	9,472	10,907	109,194	104,144	117,019
India		2,635	4,525	26,241	33,356	28,903	12,927	22,087	130,457	158,798	143,602
Mozambique		403	445	3,147	3,323	3,434	1,529	1,748	11,622	11,989	12,718
Other Countries		557	892	3,762	8,194	4,424	2,461	3,889	16,233	34,663	18,977
Subtotal:----		5,658	8,138	57,290	68,226	62,669	26,389	38,631	267,506	309,594	292,315
Filberts	MT										
European Union		5	10	103	102	104	25	52	533	523	542
Canada		0	0	139	312	168	0	0	149	474	185
Turkey		120	206	3,503	3,830	3,607	640	918	14,091	17,989	14,554
Other Countries		0	16	49	16	49	3	51	134	55	137
Subtotal:----		126	231	3,793	4,261	3,928	668	1,020	14,907	19,041	15,417
Pecans, Nsh	MT										
European Union		0	0	0	0	0	0	0	0	0	0
Greenland		0	0	0	0	0	0	0	0	0	0
Mexico		0	132	15,246	15,257	15,267	0	204	15,683	28,546	15,699
Other Countries		0	0	0	0	0	0	0	0	0	0
Subtotal:----		0	132	15,246	15,257	15,267	0	204	15,683	28,546	15,699
Roses	M										
Guatemala		2,397	2,671	37,333	31,996	40,509	390	389	5,860	5,480	6,352
Colombia		39,083	26,029	555,565	611,006	590,276	7,481	4,686	117,364	142,161	123,965
Ecuador		16,933	16,732	217,190	269,008	234,493	3,083	2,867	44,188	55,458	47,404
Other Countries		2,687	2,961	49,379	52,526	54,019	1,101	979	21,822	23,547	23,236
Subtotal:----		61,100	48,392	859,466	964,536	919,298	12,055	8,922	189,235	226,647	200,957
Carnations	MIXEO										
Guatemala		0	0	0	0	0	167	62	1,270	1,181	1,369
Colombia		0	0	0	0	0	6,945	4,850	100,738	102,060	107,577
Ecuador		0	0	0	0	0	319	258	4,099	3,722	4,809
Other Countries		0	0	0	0	0	19	7	1,239	1,952	1,258
Subtotal:----		0	0	0	0	0	7,450	5,177	107,345	108,915	115,014
Chmp & Sprk Wine	KL										
European Union		2,817	2,787	26,355	28,514	29,976	31,123	32,912	296,028	333,804	335,410
Chile		5	0	66	59	80	31	0	301	299	334
Australia		14	14	108	132	121	53	57	454	585	514
Other Countries		2	5	103	198	115	7	28	327	769	354
Subtotal:----		2,837	2,806	26,631	28,904	30,292	31,214	32,996	297,110	335,456	336,611
Ft & Verm Wine	KL										
European Union		684	595	7,867	7,154	8,626	1,639	1,436	19,395	17,677	21,364
Bermuda		5	0	16	93	16	13	0	46	274	46
Argentina		0	0	12	0	19	0	0	25	0	29
Other Countries		0	0	5	124	5	0	0	13	194	13
Subtotal:----		689	595	7,900	7,372	8,666	1,653	1,436	19,480	18,145	21,453
Other Grape Wine	KL										
European Union		26,290	18,299	259,294	250,397	280,760	84,269	85,301	907,403	1,016,233	979,786
Chile		5,386	4,481	49,771	50,353	55,970	10,735	10,245	104,737	111,619	116,316
Australia		2,227	2,643	20,676	28,722	23,057	10,492	11,453	99,543	138,507	110,972
Other Countries		2,342	1,792	21,611	21,089	24,723	4,080	3,967	41,696	47,729	46,753
Subtotal:----		36,245	27,214	351,351	350,562	384,511	109,576	110,967	1,153,379	1,314,088	1,253,827
Wine, Other Products	KL										
European Union		506	609	4,244	5,986	4,612	555	721	5,351	7,425	5,877
Canada		163	189	1,341	1,968	1,540	194	291	1,510	2,368	1,743
Japan		106	118	1,538	1,640	1,665	526	573	7,391	7,672	7,953
Other Countries		84	81	855	962	922	148	160	1,682	1,816	1,824
Subtotal:----		860	997	7,977	10,556	8,740	1,422	1,746	15,934	19,280	17,397



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World Horticultural Products and U.S. Export Opportunities; and Tropical Products: World Markets and Trade (all available electronically after 3:00 p.m. Washington DC time on release day) as well as Sugar: World Markets and Trade; Livestock and Poultry: World Markets and Trade; Dairy: World Markets and Trade, and U.S. Planting Seed Trade (available within a week after release.)

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